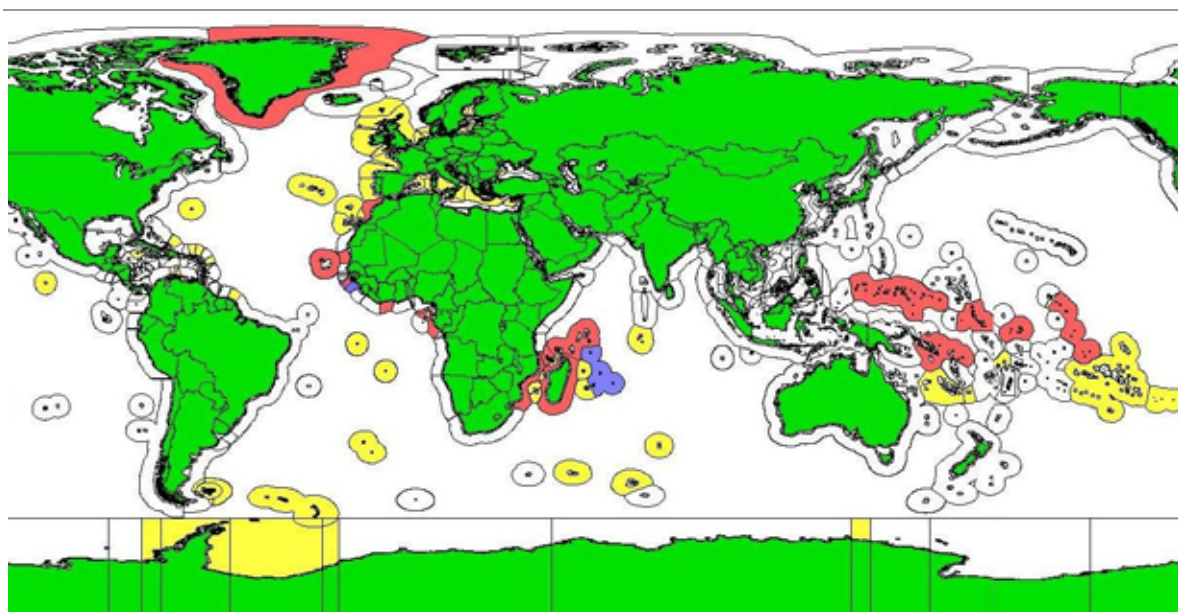

COMPARATIVE STUDY OF THE IMPACT OF FISHERIES PARTNERSHIP AGREEMENTS

TECHNICAL REPORT

May 2007



Prepared for the UK Department for Environment, Food and Rural Affairs
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SUMMARY

The EU has been negotiating bilateral fisheries agreements (FAs) on behalf of the Community fisheries sector since 1979. These agreements allow EU fishing vessels access to the fisheries resources in other countries' waters in return for a financial contribution payment. Currently, payments by the EU to developing countries for fisheries access under these agreements amount to €145 million per year. The EU has been criticised for these agreements, with claims that they are 'exporting' excess fishing capacity and not giving a fair deal to coastal states. In response, the EU sought to reform the international aspects of its fisheries policy. The outcome was a framework for Fisheries Partnership Agreements (FPAs), which aim to promote an enhanced policy dialogue between the EC and developing countries and contribute to promoting sustainable fisheries. Negotiations began in 2003 and the first FPAs were initialised in 2005.

This study evaluates the European Commission's revised policy on access arrangements, specifically the move from FAs to FPAs. The aim was to assess if they are more likely than FAs to meet the 2004 Council Conclusions on the proposed approach. The study further provides a framework to monitor the transition from FAs to FPAs, as well as qualitative performance indicators for their potential to deliver the Council Conclusions.

There have been encouraging changes in the structure and approach of FPAs compared to FAs, which suggest that many of the Council's points are likely to be addressed. The FPAs have most fully addressed the Council Conclusions on fostering partnerships and reduction of IUU fishing. The trend in FPAs away from mixed agreements and towards tuna-only agreements reduces possibilities for over-exploitation and for potential conflicts between EU vessels and artisanal fishers. FPAs are preferable to private arrangements between EU vessels and coastal states, and also agreements with many non-EU fishing nations. They provide higher and more consistent revenue to coastal states, contain greater provisions for monitoring and control and are more transparent and consistent. However, for coastal states, joint ventures or other means to develop their own fishing capacity may be preferable to access agreements in the longer term.

The value of fish caught under FPAs is estimated at €146–166 million in 2004. The countries recoup most of this through the financial contribution; the EU pays €65-75 per tonne of tuna with the balance to total €100 per tonne paid by the ship-owners. For purse seine catches, this represents a fair market rate for licence fees (13% of catch value, compared to 6% for Asian DWFs), yet it is still a poor return for coastal states compared to the potential resource rents that could be captured. An initial cost-benefit analysis shows that the greatest benefits come from direct and indirect value-added by whichever party.

Some areas still remain that give rise to concern. The Council conclusions on facilitating integration of developing coastal states into the global economy and better global governance of fisheries are the least developed areas in the FPAs, but they are also the most complex and will require coherent policies in other areas beyond FPAs and fisheries, such as trade and development. Indeed, FPAs may not be the right vehicle for addressing all such issues. When a country signs a fisheries agreement with the EU, in some cases they still seem to lose development assistance for the sector from EU country development funds (NIP), and countries must be more pro-active in prioritising the fisheries sector for support. There are no direct coherence issues between FPAs and EU trade policy (e.g. the forthcoming Economic Partnership Agreements – EPAs) as the former deal with fisheries access and the latter with market access. However, FPAs can reduce a country's trade in fisheries products if there are no local landings. If the fish caught under FPAs were to be exported through normal trade routes, this could result in a 20% increase in the value of fisheries exports to the EU from the African and Indian Ocean countries that have FAs and FPAs, without taking into account potential additional revenue from value-added processing.

Whilst FPAs show improvements over the FAs, their implementation could be further improved. The ex-ante evaluations should more thoroughly and consistently address potential impacts and value-added for the coastal state. Fishing opportunities under FPAs should be based on a proper analysis of fisheries potential including stock assessment and valuation, together with more precise definitions of effort (fishing power, rather than GRT or GT) in agreements. FPAs should promote more definite mechanisms for supporting coastal states' fisheries objectives. Joint ventures that do arise through FPAs should maintain transparency and conform to minimum standards that could be established, to ensure a fair deal for partner countries.

Coastal states need clear strategies to optimise the long-term economic benefits from their fisheries resources. Developing their own effective fisheries management capacity is essential for this, including supporting institutions and value-added infrastructure where appropriate. Effective fisheries management and good governance at the level of coastal states is necessary for enforcement of fisheries regulations, control of all fishing vessels and for nations to reap the potential benefits from their fishery resources. Whilst FPAs provide support to develop this management capacity, they also need it to be in place for critics to be satisfied that EU vessels are not taking advantage of ineffective enforcement capabilities in order to fish beyond the rules. An integrated blend of country assistance through development funding and progressive FPAs can be the best way the Community might support this.

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Acronyms

ACP	African, Caribbean and Pacific
CBA	Cost-Benefit Analysis
CEC	Commission of the European Communities
CECAF	Committee for the Eastern Central Atlantic Fisheries
CEU	Council of the European Union
CFP	Common Fisheries Policy
DWF	Distant Water Fleet
EC	European Community
EESC	European Economic and Social Committee
EPA	Economic Partnership Agreement
EU	European Union
FA	Fisheries agreement
FPA	Fisheries Partnership Agreement
ICCAT	International Commission for the Conservation of Atlantic Tunas
IOTC	Indian Ocean Tuna Commission
IUU	Illegal, Unregulated and Unreported
JV	Joint venture
LL	Longline
MCS	Monitoring, Control and Surveillance
NGO	Non-governmental Organisation
PS	Purse seine
RoO	Rules of Origin
VFM	Value for money
VMS	Vessel Monitoring System
WCPFC	Western and Central Pacific Fisheries Commission
WCPO	Western Central Pacific Ocean
WTO	World Trade Organisation

1 Introduction

1.1 Objectives of the study

This study was commissioned by the UK Department for International Development (DFID) and the Department for Environment, Food and Rural Affairs (DEFRA) in consultation with DG-Fish to look at the potential the EU Fisheries Partnership Agreements (FPAs) currently hold for fulfilling the objectives laid out in the 2004 EU Council conclusions, namely to:

- contributing towards rational and sustainable exploitation of the surplus of coastal states marine resources;
- improving scientific and technical knowledge of the fisheries in question;
- contributing towards combating illegal unregulated and unreported fishing;
- contributing towards strategies for the sustainable management of fisheries as defined by the coastal state;
- facilitating the integration of developing coastal states into the global economy; and,
- fostering better global governance of fisheries in terms of economic and environmental sustainability.

Further details on the evolution of EU Fisheries Access Agreements to Fisheries Partnership Agreements (FPAs) are given in Section 3.

1.2 Key issues

Fisheries Partnership Agreements hold significant potential to support sustainable fisheries in developing countries, but there remain a number of challenges.

Key questions include:

- Are FPAs based on a true 'partnership approach'?
- Are FPAs likely to achieve their objectives?
- Are FPAs better or worse than the alternatives?
- Can FPAs contribute to sustainable fisheries?
- Do FPAs provide value for money?
- Are FPAs coherent with trade and development policies?
- What are the gaps in knowledge and research needs?

1.3 Approach

This study considers only those EU access agreements where a financial contribution is made by the EU for fishing opportunities. These are usually with developing coastal states, where there is typically a substantial difference in economic status of the country providing access and the EU. The reciprocal agreements for fishing opportunities (with Faroe Islands, Iceland and Norway) are not considered here.

The study was guided by the following key principles:

- United Nations Convention on the Law of the Sea principles on sustainability reflecting optimal utilisation corresponding to the greatest overall long-term benefits to society in environmental, biological, social and economic terms;
- The ecosystem approach to fisheries that has been widely adopted, as the basis for the sustainable development of fisheries;
- The need for the Precautionary Approach to decision-making where there is a lack of complete knowledge;

- The Code of Conduct as guidance for conducting responsible and effective fisheries management;
- The need for innovative approaches in tackling complex natural resource management issues, in particular wealth-based approaches to fisheries management;
- The need to foster more effective governance and management of fisheries as a prerequisite to sustainable fisheries exploitation.

This study took a three-pronged approach to evaluate the key issues posed above.

Firstly, the texts of the available Fisheries Partnership Agreements were evaluated for their content and approach, in relation to a number of indicators. The indicators were selected to show how the 2004 Council Conclusions were being written into the agreements. The indicators were also assessed for the preceeding EU fisheries agreement for each country, where available, to provide a comparison of how things have changed.

Secondly, six case studies were carried out, to look in more depth at the agreements and surrounding issues. Specific points considered included: the negotiation process; utilisation rates of fishing opportunities; how the agreements might be expected to contribute to sustainable management; and the coherence of EU fisheries and development policies with national fisheries and development policies.

The case study countries were selected to cover a range of situations including:

- tuna agreements and mixed agreements;
- agreements in the Atlantic, Indian and Pacific Oceans;
- countries that have had an agreement with the EU for a long time, countries that have recently signed their first agreement with the EU, and countries that have recently not signed a protocol with the EU.

The case studies are:

- Mauritania (Atlantic Ocean, mixed agreement, has had an agreement with the EU for a long time);
- Senegal (Atlantic Ocean, previously mixed agreement but since 30th June 2006 there has been no protocol in force);
- Mozambique (Indian Ocean, FA was a mixed agreement, FPA is a tuna agreement);
- Seychelles (Indian Ocean, tuna agreement, has had an agreement with the EU for a long time);
- Solomon Islands (Pacific Ocean, tuna agreement, recently signed its first agreement with the EU);
- Non-EU agreements: an overview of fishing access agreements with non-EU countries was conducted to provide a frame of reference with which to compare the EU agreements.

Thirdly, impact and cost-benefit analyses were carried out, drawing on information from the indicators analysis and case studies.

The overall conclusions were drawn together based on how the Council Conclusions are being written in to the agreements, and how likely these provisions are to achieve the Council Conclusions.

2 Development of Fishing Agreements

2.1 Theoretical aspects of fishing access agreements

Types of fishing agreements

Fishing agreements (FAs) and Fisheries Partnership Agreements (FPAs) are arrangements between two governments or between a government and private sector companies or associations in order to gain access to fishing rights within the Exclusive Economic Zone (EEZ) of a particular country.

There are a number of different types of fishing agreements:

- Fishing agreements with regional economic organisations (EU fishing agreements and fisheries partnership agreements with ACP countries);
- Individual government to government fishing agreements, including agreements between governments within a region (Mauritius and Seychelles; Senegal and Mauritania);
- Agreements between governments and private companies (private agreements with Mauritania and the Irish fishing company; Madagascar's agreements with Spanish fishing associations; Seychelles agreements with Japanese fishing associations);
- Agreements between governments and public sector/parastatal/public-private partnerships, for example some of the historical agreements between Mauritania and foreign state-owned companies. Some of the agreements with PR China may also fall into this category.

Fishing access agreements began to proliferate in anticipation of the 1982 United Nations Convention on the Law of the Sea (UNCLOS). This established a 200 nautical mile zone which countries could claim as their exclusive jurisdiction, known as the Exclusive Economic Zone. Prior to this, the 'distant water fleets' (DWFs) of many countries had traditionally fished in the waters of other countries. The main DWF nations were the USSR, Japan, Spain, Republic of Korea, Poland, Taiwan and Portugal (WWF, 1998). With the establishment of EEZs, it therefore became necessary for individual bilateral agreements to be set up in order for these fleets to maintain their access to third countries' waters. UNCLOS provides for these agreements, which usually consist of financial payments in return for access to fisheries resources.

Targeting surplus stocks

UNCLOS recognised the special interests of coastal states in maintaining the productivity of living resources of adjacent areas of high seas and declared that coastal states could take unilateral measures of conservation for any stock of fish or other resources in any areas of the high seas to maintain the productivity of the living resources of the sea. UNCLOS enshrines the right of coastal states to exploit the resources in their EEZ and for Distant Water Fleets (DWF) to exploit surplus stocks that are not used by the coastal state. A surplus stock is that which is deemed to be beyond the harvesting means of the coastal state (most often tuna) or a stock not used by a coastal state (such as shrimp in earlier days). This concept of a surplus stock is fundamental since it is the basis fishing agreements with DWFs, including the EU's FPAs. It also presupposes a knowledge of the stock biomass and how much surplus exists. In fact, usually neither of these figures are known with any certainty.

International agreements on sustainable fisheries

As well as the right to exploit EEZs, the UN Conventions also stress the need to promote sustainable fishing. Other UN/FAO conventions which apply to fisheries and which recognise the need to manage fisheries resources in a sustainable manner include the FAO Code of Conduct for Responsible Fisheries (1995) and the UN Agreement on Straddling and Highly Migratory Stocks (1995). In addition the International Tribunal for the Law of the Sea has been presented with arguments invoking the precautionary principle (southern bluefin tuna and requests by Australia and New Zealand and Japan).

This has implications for fishing agreements and FPAs which in some cases have been criticised for contributing to over exploitation and depletion of resources and marine biodiversity. FAs and FPAs are not always very clear about the application of the precautionary principle in data-poor situations as required by the FAO Code of Conduct in relation to specific stocks (Section 3.3). There is also the question of consistency with the UN Agreement on Straddling and Migratory Stocks, to which the EU is now a signatory as well as the prevailing Precautionary Principle and a general recognition of the rights of small-scale fishermen.

Guidelines for model fishing agreements

The WWF has developed guidelines for the preparation of fisheries access agreements (Martin *et al.*, 2001) which deals with issues that should be addressed by all parties which are signatories to fishing agreements, including:

- access authorisation;
- payments;
- fisheries management practices (catch and effort restrictions; vessel reporting; cooperation on research and stock assessment);
- discards and waste;
- flag state responsibilities;
- compliance and enforcement;
- dispute settlement; and,
- transparency.

The guidelines also include model fisheries access agreements. More recently, Mfodwo (2006) produced a comprehensive manual for coastal states seeking to negotiate fishing agreements. This manual also considers fishing agreements with respect to the EU, China/Taiwan, Japan and Korea. It is evident from the state of stocks and catch levels and size that countries with fisheries agreements have not necessarily met the requirements that are set out in the WWF guidelines. It is clear that DG Fish is keen to ensure more transparency in fisheries partnership agreements and to make the sustainable exploitation of fisheries one of its key objectives. A study commissioned by the EU in 2002 found that:

- There was not always coherence between fisheries policy, EU fishing agreements with ACP countries and development policy;
- Fishing agreements and FA-related activities are not always compatible with the sustainable exploitation of fisheries in ACP third countries; and
- The impacts of EU vessels fishing under FAs in the EEZs of some ACP countries was not always compatible with UNCLOS which specifies that there must be an assessment of whether there are surplus stocks.

The FPAs intend to emphasise the sustainable exploitation of fisheries by EU vessels in the waters of ACP countries with which they have agreements. To this end, FPAs, in line

with most other fishing agreements, recognise the importance of both UNCLOS and the Code of Conduct for Responsible Fisheries adopted by the FAO Conference in 1995.

Evaluation of the economic and social impacts of FAs and FPAs essentially requires cost benefit analysis for both parties to the agreement. In general, EU FPAs and FAs are detailed in their provisions and payments in comparison with agreements signed by Asian countries (China/Taiwan, Japan and Korea) with ACP states. The key issue from the point of view of economic development is the proportion of potential economic rent or value-added that is captured by ACP countries of which the majority fall into the World Bank category of low income countries. Economic rent leakage is a key issue for developing countries where there are no or limited landings by vessels operating under fishing agreements. Namibia (which has joint ventures rather than fishing agreements) may capture up to 60% of its potential resource rent (Manning, pers. comm., 2006), but other significant ACP fishing states capture relatively little rent. Thus World Bank preliminary estimates for the capture of local value-added in Mauritania suggest that local value-added may be around 20% of the gross value of fish caught in the Mauritanian EEZ. The existence of asymmetrical knowledge on fish stocks, resource, catch, by catch and discards data often means that ACP countries are at a disadvantage in negotiating fishing agreements and contracts.

2.2 History of EU fishing agreements

The EU's first fisheries agreement was with Senegal in 1979. The number of agreements rose sharply in the 1980s (Figure 2-1), following the ratification of UNCLOS and also the accession of Spain and Portugal to the EU in 1986, who brought with them a number of bilateral agreements with other countries, particularly in West Africa. The number of agreements peaked in the early 1990s, but then started to decline as several agreements were cancelled or not renewed in the 1990s (e.g. Mozambique, Tanzania, Gambia, Morocco) (Figure 2-2). In recent years, despite the loss of previously important agreements in Senegal and Angola, the number of agreements has increased, due mainly to the new agreements being signed in the Pacific.

In January 2007, 84% of agreements (16 out of 19) were with developing countries.

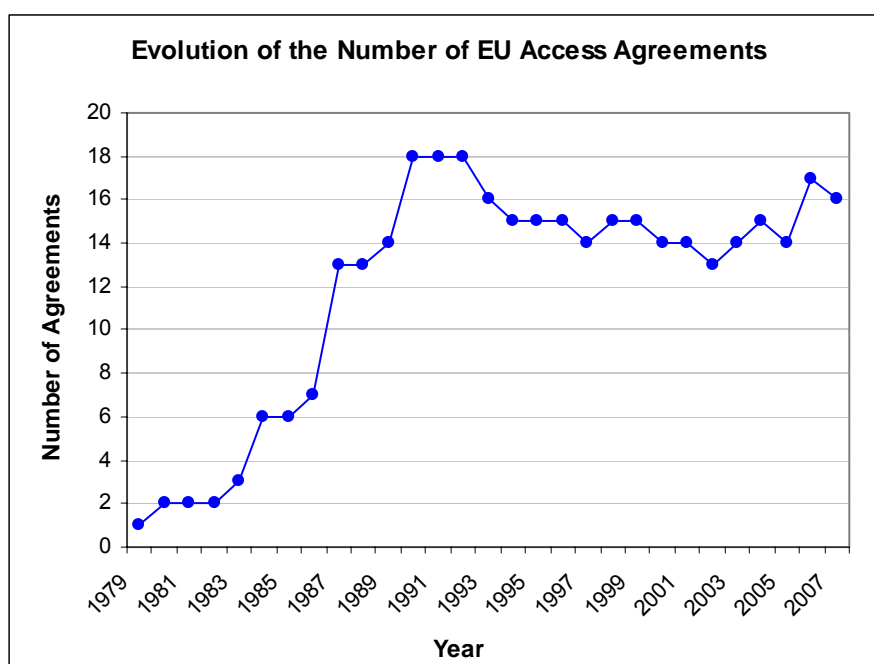


Figure 2-1 Number of EU fisheries agreements with developing countries over time

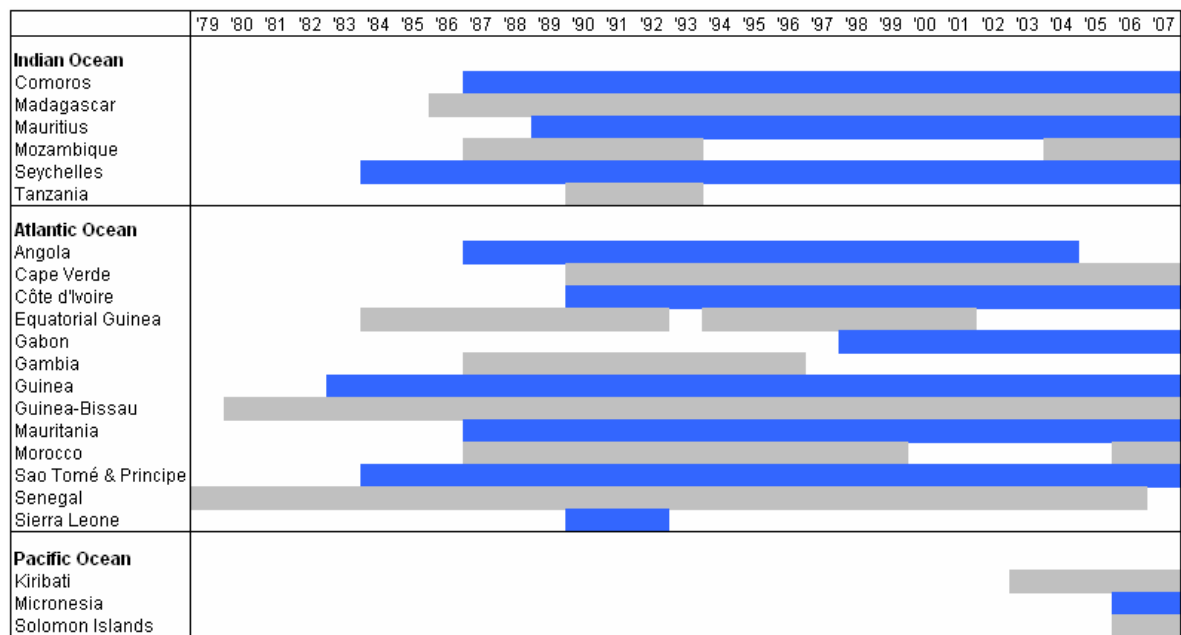


Figure 2-2 Timeline showing the history of EU fishing agreements in the Atlantic, Indian and Pacific Oceans

The EU has been heavily criticised for its fisheries agreements. Social and environmental interests claim that the EU is 'exporting' excess fishing capacity to third countries, where monitoring and enforcement is often weak, contributing to over-exploitation of fish stocks, and conflicts with local fleets and small-scale fishers. In addition, the EU member states capture most of the value-added from the resources, on average accruing three times the benefits that the ACP states receive from the fisheries agreements (IFREMER 1999). The EU fleets have also benefited from subsidies, in addition to the financial contribution payments made to secure their access to third countries' waters, which by some is also seen as a form of subsidy, since the cost is not recovered from the vessel operators.

In response to these criticisms, the Commission sought to reform the framework for international aspects of its fisheries policy under the reform of the Common Fisheries Policy (CFP).

2.3 Reform of the Common Fisheries Policy

The EU's Common Fisheries Policy provides the framework for the management of fisheries both within EU waters ('Community waters'), and outside EU waters ('international waters').

The CFP was established in 1983 as a separate policy from agriculture, through Council Regulation (EEC) No 170/83 of 25 January 1983 establishing a Community system for the conservation and management of fishery resources. Subsequent regulations have shown a gradual shift of emphasis away from promoting production towards conservation and restricting capacity within EU waters.

In 2002, certain elements of the CFP were due to be reviewed, and the Commission took the opportunity to carry out a broad review of the CFP. The Green Paper (CEC 2001) identified weaknesses and challenges and presented a number of options for its reform.

The bilateral agreements with coastal states form part of the international dimension of the CFP, in which the Green Paper highlighted the need:

to adapt to changing circumstances and new challenges such as the emergence of new players, the legitimate aspirations of many developing States to develop their fishing industry and the requirements of sustainable development and responsible fisheries. (COM(2001) 135 final, p 17).

The Commission later set out an action programme for reform of the CFP and a roadmap for its implementation (CEC 2002a). It specifies that the international element of the CFP will consist of:

- An Action Plan to eradicate illegal, unreported and unregulated fisheries (IUU);
- An Action Plan to improve, at the regional and subregional levels, the evaluation of stocks that are accessible to Community fishermen outside Community waters;
- An integrated framework for fisheries partnerships at national and/or regional level; and,
- Building, within regional fisheries organisations, new strategic alliances, in particular with coastal developing countries.

For fishing agreements, the most important element is the integrated framework for fisheries partnership agreements (CEC, 2002b) and the subsequent Council Conclusions (CEU, 2004).

The *Communication from the Commission on an integrated framework for fisheries partnership agreements with third countries* (CEC, 2002b) sets out the Commission's new approach to fisheries agreements, based on moving beyond the 'pay, fish and go' arrangements, to an enhanced policy dialogue between the EC and developing countries, in order to improve their capacity to achieve sustainable fisheries whilst contributing to their development objectives. The 'partnership' approach envisaged under the fisheries partnership agreements should 'contribute towards rational and sustainable exploitation of the surplus of coastal states' marine resources ... [and] contribute towards strategies for the sustainable management of fisheries'.

The overall objective of the CFP is to contribute to a sustainable fishing industry inside and outside Community waters. In the context of FPAs the overarching objective is to strengthen cooperation to ensure the implementation of a sustainable fisheries policy and a rational and responsible exploitation of the resources in order to allow the European DWF to consolidate its role. By continuing its activities in this domain, the EU sees itself as promoting the implementation of the Code of Conduct (FAO 1995) and the agreement to promote compliance with the international conservation and management measures by fishing vessels on the high seas (FAO 1995).

Nevertheless, the agreements are essentially commercial in nature (EESC, 2003) and the main objective of the CFP in relation to fisheries outside of Community waters is to 'maintain the European presence in distant fisheries and to protect European fisheries sector interests' (CEC, 2002b).

The EU began negotiating FPAs in 2003, and the first ones to come into force did so in 2006. The EU has signed or initialled 15 FPAs (with Cape Verde, Comoros, Côte d'Ivoire, Gabon, Greenland, Guinea-Bissau, Kiribati, Madagascar, Mauritania, Federated States of Micronesia, Morocco, Mozambique, São Tomé & Príncipe, Seychelles and the Solomon Islands). The EC is also expected to negotiate FPAs with Mauritius and Guinea Conakry during 2007.

FPA have been in implementation for a relatively short period of time. The first FPA to be initialled and provisionally applied was Comoros (from 01/01/2005). Most other FPAs only came into force during 2006, less than a year ago. This limits the evaluation that can be potentially undertaken concerning their implementation. However, it provides an opportunity to assess the current state of play and provide recommendations for possible improvements.

In order to assess whether the FPAs have been successful in addressing the 2004 Council Conclusions on fisheries agreements with third countries (CEU, 2004), it is necessary to outline the main objectives ascribed to them. Section 2.4 describes the main features of the FPAs; Section 3 compares the previous fisheries agreements with the new FPAs, and considers whether they have been successful in addressing the Council Conclusions.

The 2004 Council Conclusions on fisheries agreements with third parties highlighted the following issues that the new FPAs should address:

- contribute towards **rational and sustainable exploitation of the surplus** of coastal States' marine resources, in particular by preventing the overfishing of stocks which are of interest for local people; in this context due account will be taken of the coastal States' priorities in favour of its private national sector;
- improve **scientific and technical knowledge** of the fisheries in question, taking into account the existing and necessary work in the field carried out at the appropriate regional level and taking into consideration the likely impact of fishing on the environment;
- contribute towards **combating illegal, unregulated and unreported fishing**, in particular by stepping up in a non-discriminatory fashion the management, control and follow-up measures for fishing operations;
- contribute towards **strategies for the sustainable management** of fisheries as defined by the coastal State, in particular by taking account of the development programmes elaborated at national and/or regional level with Community assistance in accordance with cooperation or association agreements;
- facilitate the **integration of developing coastal States into the global economy**, inter alia by promoting fair conditions of employment between the employees of the sector and by encouraging the creation of an environment that is favourable to private investment and to the development of a dynamic, viable and competitive private sector, notably by a framework supporting European investments and the transfer of technology and vessels; and,
- foster better **global governance of fisheries** at financial and political level, in particular by strengthening the capacity building of coastal States and by the fight against corruption.

2.4 Main features of Fisheries Partnership Agreements

The structure of the FPAs remains similar to the previous fisheries agreements, consisting of an over-arching agreement, supplemented by a protocol and annexes which detail the financial contribution, fishing opportunities and conditions.

The main differences between FAs and FPAs are summarised in Table 2-1. Since the 2002 integrated framework for fisheries partnership agreements and the 2004 Council Conclusions, the Commission has anticipated the introduction of new elements into EU fishing agreements. As a result, some of the later fisheries agreements, negotiated before

the introduction of FPAs, but after the integrated framework and council conclusions, already incorporated some of the elements of FPAs.

The main differences between the FAs and the FPAs relate to the way the financial contribution is calculated and the change from **targeted actions** to support for defining and implementing a **sectoral fisheries policy**. Other changes include scientific cooperation and review of the agreement, increased provision for vessel monitoring schemes and MCS, a social clause covering employment of seamen, sometimes an exclusivity clause covering the operations of Member States' vessels, a principle of non-discrimination between different fleets fishing in the zone, and broader partnership actions relating to economic, commercial, scientific and technical cooperation.

Under FAs, the EU made a financial contribution based on the fishing opportunities available to EU vessels. A proportion of this was then put towards **targeted actions** in the fisheries sector, such as institutional support, training, research activities, and support for non-industrial fisheries. In some respects, the sums allocated to such activities helped ensure that part of the money received under a fisheries agreement was reinvested in the sector and helped support fisheries management. However, for a commercial agreement where the EU was paying financial compensation for access to fisheries resources, some have questioned what authority the EU had to determine how the coastal state should spend the funds.

Under the FPAs, in an effort to move beyond purely commercial agreements, and to contribute more effectively to sustainable fisheries management in the coastal state, the EU has widened the scope of the financial contribution, which is now calculated on the basis of two separate components:

- (i) access by Community vessels to the coastal state's fishing zone;
- (ii) the Community's financial support for enhancing responsible fishing and the sustainable exploitation of fisheries resources in the coastal state's fishing zone.

In practice, the second part has not been consistently applied to FPAs. It has been included only in tuna agreements (not mixed agreements, which generally attract a much higher financial contribution), and was not included in the tuna agreements with Solomon Islands, Federated States of Micronesia or Comoros. However, these were the first FPAs that were negotiated. All subsequent tuna FPAs negotiated after the 2004 Council Conclusions, do include the second part of the financial contribution.

The coastal state then determines what proportion of the total sum will be put towards 'defining and implementing a sectoral fisheries policy with a view to encouraging responsible fishing in its waters' (see also section 3.2). This gives greater flexibility to the coastal state and is to be welcomed, but the process for how this will be implemented and monitored is still developing. The objectives are discussed in the Joint Committee and the intention of the Commission is to monitor the outcomes against the objectives, rather than monitoring actual spend.

The Commission also states that the private sector shall progressively assume greater responsibility for the part of the financial contribution relating to access by Community vessels. When renegotiating the new FPAs, the proportion of the total contribution that the shipowners pay for tuna agreements has risen from 25% (€25 per tonne, to the EU's €75 per tonne) to 35% (€35 per tonne, to the EU's €65 per tonne). However, the earliest FPA Protocols that were negotiated (Comoros and Seychelles) are still based on a share of 25% paid by the shipowners.

The FPAs provide opportunities for the revision of fishing opportunities based on the best available scientific advice, through a Joint Committee. Joint Committees have always been included in the EU's fisheries agreements – the very first agreement with Senegal in 1979 provided for a Joint Committee to 'ensure the agreement is applied correctly'. However under the FPAs it is specified that they will meet at least once a year and may review the fishing opportunities available and consequently the level of financial contribution. A Joint Scientific Committee, or 'joint scientific meeting' is a new introduction to most agreements, and allows the parties to monitor the state of resources, providing information for the Joint Committee.

The Communication from the Commission highlighted the need to improve Monitoring, Control and Surveillance (MCS) through 'partnership actions' with the countries concerned. All FPAs provide for observer programmes (as did many FAs), and there is increased provision for satellite monitoring of vessels through Vessel Monitoring System (VMS) Protocols. Where conditions are not sufficient for a VMS Protocol to be established, the Commission intends to focus support on helping establish them. The FPAs also specify that transshipment can only take place in designated ports, not at sea in the EEZ of the coastal state concerned.

The promotion of joint enterprises in the fisheries sector is a feature of all FPAs, which may cover vessel transfers and the inclusion of European vessels into the fishing fleet of the partner state. The transfer of technology, know-how and capital are also foreseen.

FPAs have also incorporated a 'social clause', stipulating minimum conditions for the employment of vessel crews which must comply with minimum International Labour Organisation (ILO) standards.

Most FPAs include an 'exclusivity clause' which specified that EU vessels may only fish in the EEZ of the coastal state concerned with a licence issued under the FPA. This means that fishing licences cannot be negotiated by Member States' vessels outside the FPA, and ensures that Community vessels are all engaged in fishing under the same terms and conditions.

In relation to the process that FPAs are negotiated, agreed and implemented, the EU undertook to conduct sustainability impact assessments on FPAs, including an evaluation of the impact the agreement would have on the local economy. Since 2003, ex-ante evaluations have been undertaken on all new agreements or renewals of agreements.

Table 2-1 Differences in the content of FAs and FPAs

Aspect	FAs	FPAs
Fishing opportunities	Tuna and mixed fisheries	Tuna and mixed fisheries, but with a trend away from mixed agreements
Financial contribution	Financial compensation based on fishing opportunities (e.g. reference tonnage of tuna, GRT or number of vessels)	Financial 'contribution' based on fishing opportunities (at same rate as FAs) and support to a sectoral fisheries policy (since the 2004 Council Conclusions) (see Section 3.6.1)
Actions in the fisheries sector	Targeted actions: specified amounts of the financial compensation to be put towards particular areas	'Defining and implementing a sectoral fisheries policy': specified amount of the financial contribution to be put towards actions under the fisheries policy, specifics to be defined later by coastal state and EC
Shipowner contributions	Shipowners pay for licences. Mixed agreements: amount varies; Tuna: €20-25 per tonne	Shipowners pay for licences. Advance payment generally higher than FAs. Mixed agreements: amount varies; Tuna: €35 per tonne
MCS	✓ MCS activities may be supported under targeted actions	✓ MCS activities may be supported under partnership actions
VMS	✗ Few FAs include a VMS protocol for satellite monitoring of EU vessels	✓ Most FPAs include a VMS protocol for satellite monitoring of EU vessels (although the necessary conditions for implementation do not always exist)
Employment of local crew	✓ Employment of local or ACP crew (usually included)	✓ Include employment of local or ACP crew
Social clause (employment conditions to ILO standards)	✗ No social clause	✓ All contain social clause
Exclusivity clause	✗ Not included (only in Mauritius 2003 FA)	✓ Most FPAs include the exclusivity clause ¹
Joint ventures (JVs)	✗ Not usually included	✓ Most include provision for JVs
Impact evaluation	✗ No ex-ante impact evaluations Ex-post impact evaluations carried out since 2003	✓ Impact evaluations carried out for all FPAs
Joint Committee	✓ Included in all FAs, but did not always meet	✓ Included in all FPAs, and must meet once per year
Scientific review/ committee	✗ Not included in FAs	✓ Provision for scientific review of data in all FPAs

¹ All FPAs negotiated since the 2004 Council Conclusions contain an exclusivity clause (stating that Community-flagged vessels may only fish in the zone if in possession of a licence issued under the Agreement). The FPAs with Micronesia and Solomon Islands do not have a clearly stated exclusivity clause.

2.5 Current EU fisheries agreements

The EU has a network of fisheries agreements in Central and West Africa, the South-West Indian Ocean, and the Pacific Ocean (Figure 2–3). These are complemented by EU Member States' overseas territories, although EU vessels do not have automatic rights to fish in these EEZs. Some agreements have recently not been renewed (Senegal) or have been denounced (Angola), reducing their overall coverage in the Atlantic.

Table 2-2 Summary of current FPAs by region (2007)

Region	Country	Date	No. years	FPA	Target species (& tuna ref tonnage)	Value (€million/year)	Comments
Indian Ocean	Comoros	2005-2010	6	✓	Tuna (6,000t)	0.39	
	Madagascar	2007-2012	6	✓	Tuna (13,000t, inc. from 11,000t)	1.197 (increased from 0.99)	Protocol was amended, increasing reference tonnage
	Mauritius	2003-2007	4	FA	Tuna (6,500t)	0.49	
	Mozambique	2007-2011	5	✓	Tuna (10,000t)	0.90	
	Seychelles	2005-2011	6	✓	Tuna (63,000t, inc. from 55,000t)	5.355 (increased from 4.125)	Protocol (2005-2011) was transferred from previous FA, amendment comes into force January 2008.
Atlantic Ocean	Cape Verde	2006-2011	5	✓	Tuna (5,000t)	0.385	
	Cote d'Ivoire	2007-2013	6	✓	Tuna (7,000t)	0.595	
	Gabon	2005-2011	6	✓	Tuna (11,000t)	0.86	Agreement text not available; only Protocol from previous FA
	Greenland	2007-2012	6	✓	Shrimp, cod, halibut, redfish, snowcrab	14.307 plus up to 1.54	Extra payment if extra cod and capelin opportunities provided each year
	Guinea	2004-2008	4	FA	Shrimp, Tuna, Pelagic fin-fish Cephalopods	4.25	
	Guinea Bissau	2007-2011	4	✓	Shrimp, Tuna Demersal & pelagic sp Cephalopods	7.5	EUR 7 million contribution, plus EUR 500,000 to improve sanitary and phyto-sanitary conditions and MCS system.
	Mauritania	2006-2012	6*	✓	Crustaceans Demersal sp Pelagic sp, Tuna Cephalopods	86.0	
	Morocco	2006-2010	4	✓	Demersal sp Pelagic sp Tuna	36.1	
	São Tomé & Príncipe	2006-2010	4	✓	Tuna (8,500t)	0.663	
Pacific Ocean	Solomon Islands	2006-2009	3	✓	Tuna (6,000t)	0.4	
	Micronesia	2006-2009	3	✓	Tuna (8,600t)	0.559	Agreement for 9 years, Protocol for 3 years
	Kiribati	2006-2012	6	✓	Tuna (6,400t)	0.478	
TOTAL						160	
TOTAL excl. Greenland						146	

* The Mauritania Protocol is for a period of two years, renewable tacitly for 2 additional periods of two years.

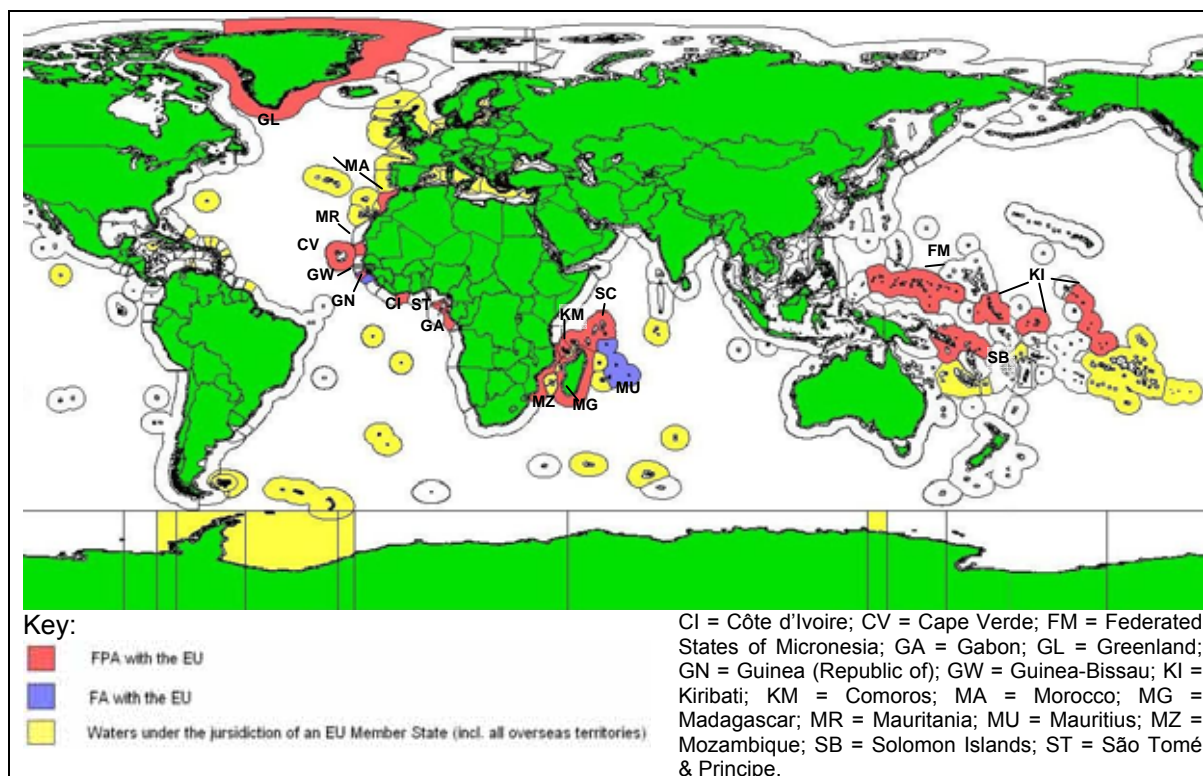


Figure 2-3 Map showing the location of EU FAs and FPAs, and waters under the jurisdiction of an EU Member State

The status of FPA agreements (and other ongoing FA agreements), and availability of documents, is summarised in Table 2-2. This is correct as of May 2007. More detailed tables showing the content of FPAs and FAs are provided in Annex 2.

The current ongoing fishing agreements amount to a total of €145 million per year. According to DG Fish, 600 EU vessels are involved in fishing agreements, with a catch value of around €2 billion (approximately 20% of the value of total EU catches). These agreements are estimated to support more than 30,000 jobs (Donatella, 2007).

2.6 EU distant water fleet activities

Fishing agreements and fisheries partnership agreements must be seen within the wider context of the EU fleet's activities in external (non-EU) waters. EU vessels are active in all the world's oceans and major fisheries. Whilst FAs and FPAs provide important access for EU vessels to coastal states' EEZs in the Atlantic, Indian and Pacific Oceans, EU vessels also operate under private agreements, in joint ventures and on the high seas. The following sections review the activity and dominance of EU vessels in the Indian, Atlantic and Pacific Oceans, focussing mainly on tuna purse seine fisheries.

Responsibility for reporting catches to FAO rests with a vessel's flag state, irrespective of where fish have been caught. This makes it difficult to assess the proportion of catches from a particular area or EEZ that have been taken by EU vessels, as from such data, it is not clear where those catches were taken. It must also be remembered that there are concerns regarding the accuracy of reported catch data from vessels, as under-reporting and mis-reporting undoubtedly occur.

Regional management bodies for tuna fisheries, such as the Indian Ocean Tuna Commission (IOTC), International Convention for the Conservation of Atlantic Tuna (ICCAT) and the recently-created Western and Central Pacific Fisheries Commission (WCPFC)

receive data from flag states concerning catches by their vessels within their respective areas.

For purse seine tuna vessels, data are reported to 1° by 1° squares, and longline vessels report to 5° by 5° squares. The purse seine data are of a sufficient resolution to be able to assess the proportion of catches that have been taken from a particular EEZ. This analysis has been carried out for the EEZs in the IOTC area where the EU has fishing agreements to assess the proportion of the catch that EU vessels are taking (see section 2.6.1). For longline fisheries, it is only possible to consider the catches taken by EU vessels as a proportion of the total catches in the management area (i.e. including EEZs and high seas areas), because of the lower resolution at which catches are reported.

On average, total catches of tuna in the Western Pacific reach around 1.8 million tonnes per year compared with 0.5 million in the East Pacific, 0.7 million in the Indian Ocean and 0.4 million in the Atlantic Ocean². It is estimated that the EU's needs for tuna are in excess of 1 million tonnes per year³.

2.6.1 EU tuna catches

Indian Ocean

The EU fleet catches around 250,000 tonnes of tuna and tuna-like species in the Indian Ocean per year (SFA, 2004). This is approximately 70% of all tuna catches in the Indian Ocean.

The EU dominates the purse seine fishery in the Indian Ocean (Figure 2–4), taking about 66 % of purse seine tuna catches (Yellowfin, Big Eye and Skipjack tuna) in the area. However, they are less dominant in the longline fisheries, taking less than 1 % of longline tuna catches in the IOTC area (although French longliners fishing in La Reunion are known not to report to IOTC). This is also demonstrated by the proportion of purse seine licences given by the Seychelles to purse seines and long-liners in 2004 (Table 2-3). 69% of purse seine licences were issued to French and Spanish vessels. In contrast, Japan and Taiwan dominate the longline fishery, being issued with 90% of Seychelles longline licences. Total catch in the Indian Ocean by purse seiners holding a Seychelles licence for 2004 is estimated as 358,000 tonnes (the third highest annual catch reported to date). Total catch for long-liners is estimated as 9,891 tonnes over the same period (SFA, 2004).

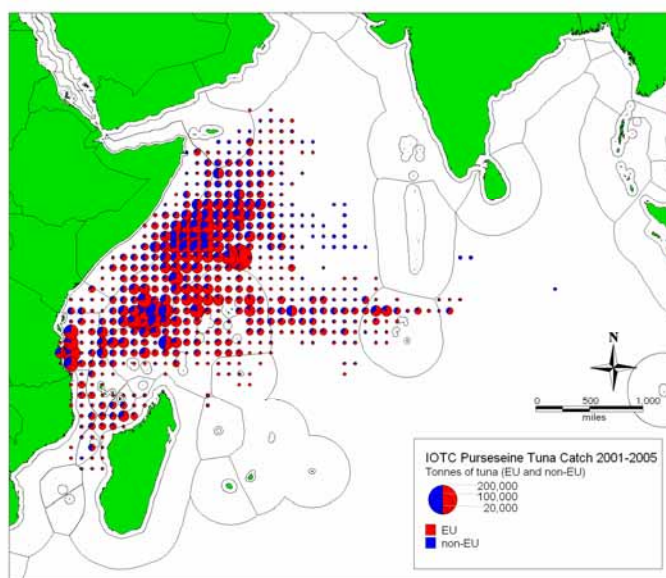


Figure 2-4 Illustration of total EU and non-EU catches in the Indian Ocean, 2000-2005 (■ = EU; ■ = Others)

² Source: EU Proposed Council Regulation for a EU/Kiribati agreement 2002

³ A reference tonnage of 5370 tonnes within the Comoros agreement was suggested to represent 0.5% of the EU's need for the provision of tuna into its markets (EU Proposed Council Regulation for Comoros, 2005.)

Table 2-3 Percentage of purse seine and longline licences given to different countries by Seychelles

Purse Seiners		Long Liners	
Spain	38%	Japan	33%
France	31%	South Korea	9%
Italy	2%	Taiwan	57%
Panama	2%	Others	1%
Seychelles	23%		
Iran	2%		
Netherlands Antilles	2%		

Source: Seychelles Fishing Authority Annual Report 2004

EU catches from within EEZs

By assigning purse seine catches in the IOTC area to particular EEZs, we can derive an estimate of the proportion of catch that EU vessels are taking from within countries' EEZs. EU vessels take between 75 % and 85 % (average 79 %) of the purse seine catch from 65 % and 71 % (average 68 %) of the purse seine catch from EEZs where it does not have a fisheries agreement (instead relying on private arrangements for licences) (Table 2-4). In Mozambique's EEZ during 2000–2003 (when the EU did not have a fisheries agreement), EU vessels took 69 % of the purse seine catch; during 2004 and 2005 (when the EU did have a fisheries agreement), EU vessels took 84 % of the purse seine catch from the EEZ.

Table 2-4 EU purse seine catch as a percentage of total purse seine catch from within EEZs in the Indian Ocean

	FA or FPA with the EU? ¹	Purse seine catch in the EEZ, 2000–2005 (tonnes)	EU purse seine catch in the EEZ, 2000–2005 (tonnes)	EU purse seine catch as a % of total purse seine catch in the EEZ
Comoros	FA (FPA)	32,885	24,873	75.6 %
Kenya	--	15,109	10,101	66.9 %
Madagascar	FA (FPA)	49,985	39,044	78.1 %
Mauritius	FA	19,864	16,881	85.0 %
Mozambique	(FA) (FPA)	30,317	22,881	75.5 %
Seychelles	FA (FPA)	411,693	313,149	76.1 %
Somalia	--	202,859	131,572	64.9 %
Tanzania	--	97,327	69,585	71.5 %
Total		860,038	628,086	73.0 %

Source: IOTC data

1 The catch data show the total catch from 2000 – 2005, when the countries in question had FAs with the EU. Those that now have FPAs are indicated in brackets. Mozambique had an FA from 2004 only.

Atlantic Ocean

The EU purse seine fleet took 75% of all purse seine tuna catches in ICCAT waters over the period 1992–2002 (Figure 2-5). The proportion of purse seine catches taken by EU vessels for the period 2001–2004 is illustrated in Figure 2–6. The EU purse seine catch totalled 108,000 tonnes in 2002, 79 % of the total purse seine catch for the region. The catch for each year is shown in a series of maps in **Figure 2-7**, which illustrate how the location of catches varies from year to year depending on the variable migration of tuna.

It should be noted that the EU is less important in longline fisheries, which are dominated by Japanese, Taiwanese and Korean fleets. In the period 2001–2004, the EU accounted for 29% of longline catches in the ICCAT region.

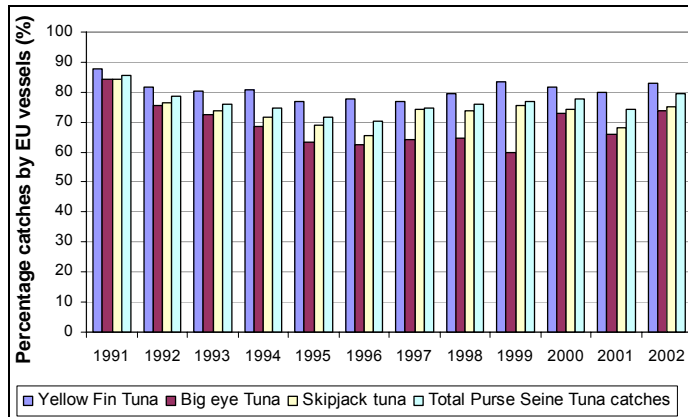


Figure 2-5 Proportion of purse seine catches taken by EU fleets in ICCAT waters

Note: Not including tuna from long-liners or pole & line vessels

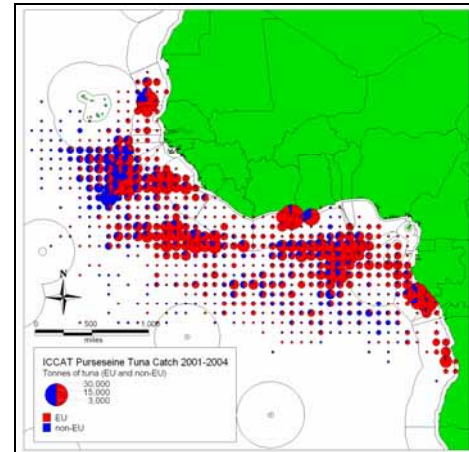


Figure 2-6 West Africa ICCAT purse seine total tuna catch 2001-2004

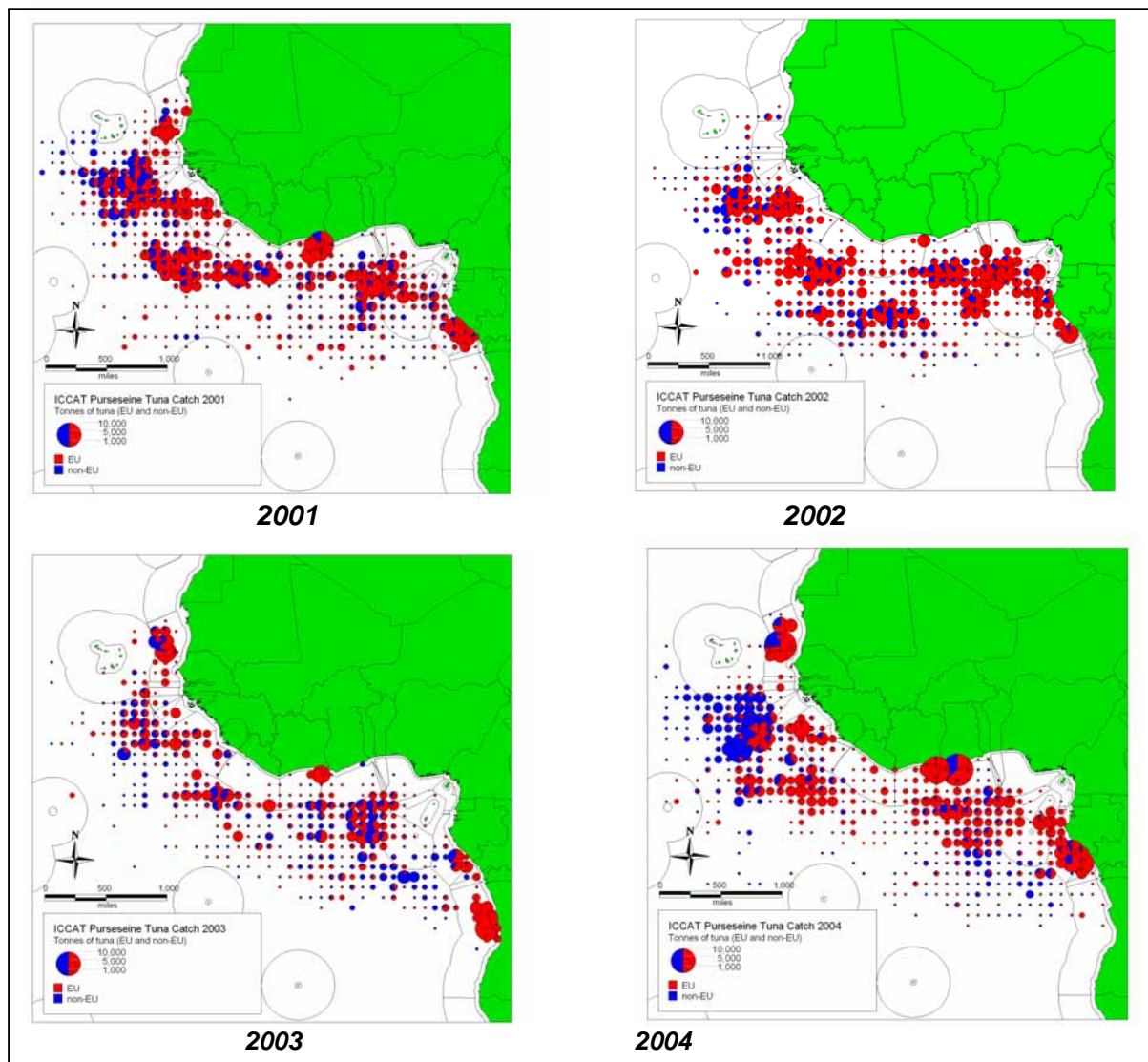


Figure 2-7 West Africa ICCAT Purse seine Tuna Catch 2001-2004

Pacific Ocean

Traditionally the annual catches for the four main species of tuna in the Western Central Pacific have represented approximately 50% of the world's catches. Catches from purse seiners range from 800,000 to 1 million tonnes, per year⁴. EU vessels do not have a long history of fishing in the Pacific and currently have a low level of activity within the Pacific. Of a total reported purse seine catch in the region of 1,558,876 tonnes in 2005, EU vessels reported 3,431 tonnes (0.2%) (FFA, *pers. comm.*). In the Kiribati EEZ for example, total catches from purse seiners were approximately 100,000 tonnes with Spanish contributing 5.5%⁵. It is estimated that EU fleets catch around 5,200 tonnes of tuna per year in the Western Central Pacific in addition to catches in the Eastern Pacific⁶.

However, due to the productivity of the tuna resources, and problems with declining catches in other oceans, the EU sees the Pacific tuna fisheries as of strategic importance. The recent entry of the EU into fishing agreements in the Pacific (with Kiribati, Federated States of Micronesia and the Solomon Islands) reflects this interest. The recently-formed Western and Central Pacific Fisheries Commission (WCPFC) is responsible for the conservation and management of highly migratory fish stocks in the region. It was responsible for freezing purse seine fishing effort at 2004 levels, which would make it harder for new entrants to the fishery beyond this date. The fishing opportunities provided for in the EU FPAs in the Pacific, which had been signed but had not yet come into force (FSM and Solomon Islands), were taken into account in the freezing of effort levels. Through the FPAs, therefore, the EU secured itself a place in the Pacific tuna fisheries.

2.6.2 Other fisheries

Atlantic Ocean

Catches by distant water fleets in the Eastern Central Atlantic (CECAF) area peaked at over 50 % from 1969 to 1977, while the maximum share of DWF catches at a global level during this period were only 12 % (Garibaldi & Grainger, 2002). It should be noted that Spain and Portugal are not considered as 'distant water fishing nations' in these data, because part of their territory lies in the CECAF area. EU vessels have been active in the Atlantic Ocean for many decades, in particular Spanish and Portuguese, prior to the accession of those countries to the EU in 1986. Access for EU fleets to EEZs of coastal states in the area has been maintained through fishing agreements and FPAs.

The Atlantic is the only region where the EU still has mixed fishing agreements, currently held with Guinea, Guinea Bissau, Mauritania and Morocco. The last three of these are Fisheries Partnership Agreements.

EU catches from within EEZs

From the data available, it is not possible to calculate how much catch EU vessels take of the total catch from the EEZs of coastal states in the Atlantic region. However, we can calculate how much the EU and other DWF nations take from coastal CECAF divisions, within which coastal states' EEZs lie and their national fleets take the majority of their catches (see Figure 2-8). These are the areas where distant water fleets are likely to come most into conflict with local fleets.

The EU accounted for on average 9.8 % of non-tuna catches in the coastal CECAF divisions over the period 1995–2004. This included catch from within Spain and Portugal's

⁴ Source: EU Proposed Council Regulation for a EU/Kiribati agreement 2002

⁵ Source: Confidential Ex-ante evaluation for Kiribati

⁶ Source: Confidential Ex-ante evaluation for Kiribati

EEZs (Canary Islands and Madeira), as well as catches from Mauritania and Senegal's EEZs, taken under fishing agreements and FPAs. Other DWF nations accounted for an average of 20.5 % of catches over the same period, and coastal states for 69.7 % (Table 2-5), although this figure includes locally-flagged vessels which may be run under joint ventures with distant water fishing nations.

Although the EU is a significant player in fisheries in the CECAF area, and is important in some fisheries (e.g. tuna purse seine), their importance in terms of overall catches is not as great as is sometimes perceived.

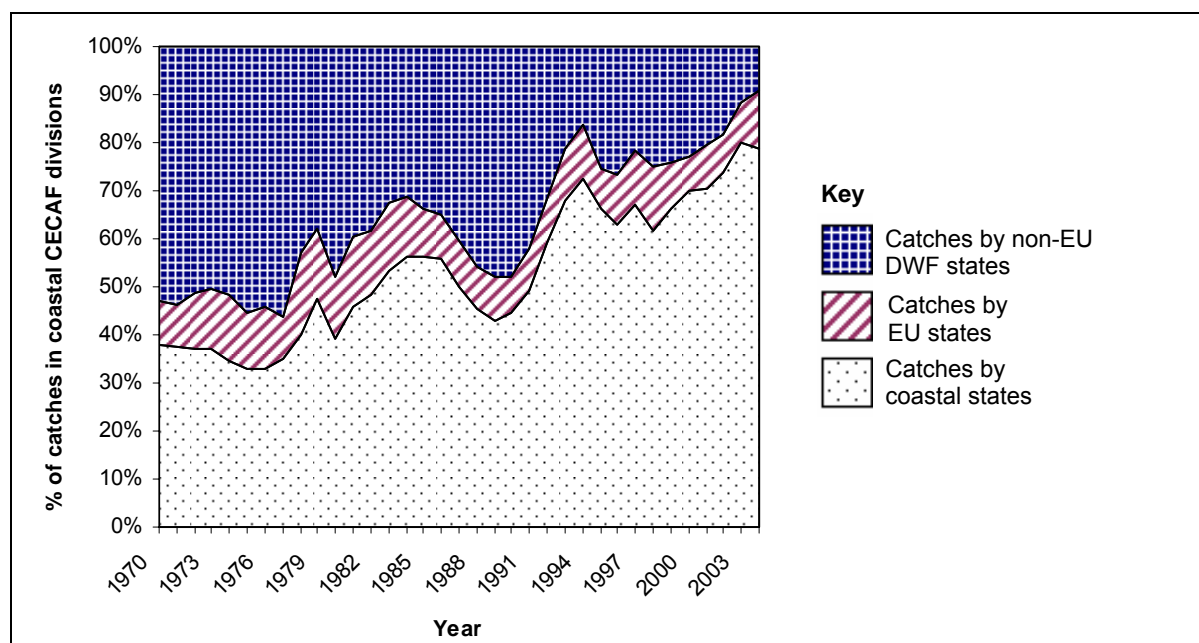


Figure 2-8 Catches by EU, coastal and non-EU DWF nations in coastal CECAF areas

Source: FAO Fishery Information, Data and Statistics Unit (2006) Fishstat, CECAF capture production database 2006.

Notes: Total catches calculated for coastal CECAF divisions 34.1.1 (Morocco coastal), 34.1.3 (Sahara coastal), 34.1.9 (Northern coastal, not known), 34.3.1 (Cape Verde coastal), 34.3.3 (Sherbro), 34.3.4 (Western Gulf of Guinea), 34.3.5 (Central Gulf of Guinea), 34.3.6 (Southern Gulf of Guinea). Tuna catches were not included as they are not assigned to individual CECAF divisions.

Table 2-5 Percentage of total catches in coastal CECAF areas taken by coastal, EU and non-EU DWF nations, 1995–2004

% of total catches	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	Average (1995–2004)
By coastal states	66.4	62.8	66.9	61.7	66.1	70.2	70.3	73.9	79.9	78.7	69.7
By EU countries	8.3	10.6	11.5	13.2	9.6	7.1	9.4	7.9	8.3	12.2	9.8
By non-EU DWF countries	25.3	26.6	21.6	25.0	24.3	22.7	20.3	18.2	11.8	9.2	20.5

Source and notes: see Figure 2-8.

3 How Fisheries Partnership Agreements address the 2004 Council Conclusions

This section reviews how FAs have evolved from the previous EU fisheries access agreements (FAs) and whether FPAs are achieving their objectives outlined in the 2004 Council Conclusions.

In general the FPA is made up of an overarching agreement which covers the main features and principles, and a protocol which specifies exactly how the agreement will work in practice, including fishing opportunities and financial contribution. For example, a general objective within the agreement may be to contribute to the elimination of IUU fishing. It is necessary to look at the protocol to see exactly what MCS procedures are put in place, or whether support has been given to either 'targeted actions' to support local MCS or support to a fisheries policy that may cover this as one of its priorities.

3.1 Indicators

In order to assess how the FPAs have addressed the 2004 Council Conclusions, a number of indicators were selected to evaluate whether there have been changes since the previous fishing agreements (Table 3-1).

Indicators were selected that could be measured from the text of the agreements, i.e. where information was provided within the agreement or the protocol which allowed a change to be measured. These are of two types: (i) presence and absence indicators, where the indicator is either present or absent in an agreement; and (ii) indicators of degree, where the indicator may be present, but to a degree depending on, for example, the value of financial contribution or the percentage of the financial contribution put towards actions in the fisheries sector.

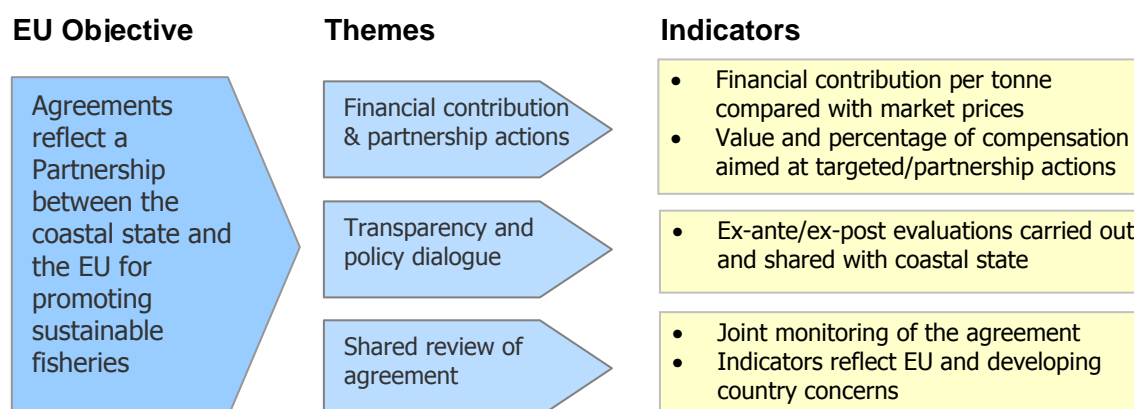
In some cases only a limited number indicators could be identified, illustrating in part a weakness in how this objective may be written into the FPAs. For example, only two indicators could be identified for improving scientific knowledge of the fishery, as Joint Scientific Committees and possible support for scientific research are the only mechanisms provided for in the agreements. There may be a number of other indicators that would more effectively measure achievement of the Council conclusions, and these form part of our recommendations (Section 6).

These indicators are described and analysed in detail in the sections below. A table summarising the incorporation of the presence and absence indicators in the FPAs is given in the Conclusions section (6.1). Each indicator is considered to produce a final synthesis of the most probable performance of the FPAs in addressing the Council concerns (Section 5).

Table 3-1 Selected indicators to review the differences between EU FAs and FPAs

Objectives of the 2004 Council Conclusions	Themes	Indicators
Fostering Partnerships (Section 3.2)	Financial contribution and Partnership actions	<ul style="list-style-type: none"> Financial contribution per tonne compared with market prices Value and percentage of contribution aimed at targeted/partnership actions (see Section 3.6.1)
	Transparency and policy dialogue	<ul style="list-style-type: none"> Ex ante/ex post evaluations carried out and shared with the coastal state
	Shared review of the agreement	<ul style="list-style-type: none"> Joint monitoring of the agreement Indicators reflect EU and developing country concerns
Contributes towards rational and sustainable exploitation (Section 3.3)	Limits on EU effort	<ul style="list-style-type: none"> Exclusivity clause for EU vessels
	EU vessels target surplus stocks	<ul style="list-style-type: none"> Stock assessments and current fishing effort taken into consideration
	Improved fisheries management through technical measures	<ul style="list-style-type: none"> Catch limits through use of quotas or effective limitations on fishing effort
		<ul style="list-style-type: none"> Biological recovery
		<ul style="list-style-type: none"> Gear specifications
		<ul style="list-style-type: none"> Defined fishing area
	Flexibility	<ul style="list-style-type: none"> By-catch limits Allows for reduction or increase in fishing possibilities based on scientific evidence
	Cost of licences	<ul style="list-style-type: none"> % share of shipowners contribution
Improve scientific knowledge of fisheries in question (Section 3.4)	Forum to discuss stock status	<ul style="list-style-type: none"> Forum exists for dialogue on stock status (e.g. Joint Scientific Committee)
	Support research, stock assessment and valuation	<ul style="list-style-type: none"> Support provided for research, stock assessment and valuation of fisheries
Contribute towards the elimination of IUU fishing (Section 3.5)	Satellite monitoring of EU vessels	<ul style="list-style-type: none"> VMS requirements / VMS Protocol
	Monitoring of fishing activities	<ul style="list-style-type: none"> Requirement for scientific observers Control of transshipments (only in ports)
	Compliance	<ul style="list-style-type: none"> Compliance of the EU Fleet
Support strategies for sustainable management defined by the coastal state (Section 3.6)	Financing and partnership actions	<ul style="list-style-type: none"> Proportion (%) of financial contribution for targeted actions or development and implementation of a fisheries policy
	Management capacity	<ul style="list-style-type: none"> Fisheries management capacity of coastal state
Facilitate integration of state into the global economy (Section 3.7)	Support development of domestic fishing and processing sectors	<ul style="list-style-type: none"> Support for Joint Ventures (or local investment)
	Support to local economy	<ul style="list-style-type: none"> Support for local landings
		<ul style="list-style-type: none"> Employment of local crew Use of local services
Foster better global governance of fisheries (Section 3.8)	Strengthening the capacity building of coastal states	<ul style="list-style-type: none"> Support development and implementation of fisheries management framework and fisheries policy Training and capacity building for CS Sustainability of fisheries management measures
	Fight against corruption	<ul style="list-style-type: none"> Transparency Corruption

3.2 Foster partnerships



The ‘partnership’ aspect of the FPAs relates to an increased dialogue in policy and sustainable fisheries management initiatives, a commitment to sharing information, know-how and technology, provisions for the development of joint ventures in the fisheries sector, and financing for partnership actions to develop and implement a sectoral fisheries policy (the replacement for targeted actions in the FAs), and in some cases, an extra financing amount that does not relate to the fishing opportunities, but instead to supporting sustainable fisheries management. These aspects are reviewed in sections 3.2 to 3.6.

In addition to these aspects, a ‘partnership’ indicates that the two parties have comparable status and power within a relationship. This section looks at transparency in policy dialogue and sharing of information, and the degree to which the agreement can be reviewed by each partner. The indicator concerning the value and percentage of contribution aimed at targeted actions and partnership actions is covered in Section 3.6.

During research into the case studies, many of the partners from coastal states expressed concern that the FPAs may not yet fully represent a ‘partnership’. They felt the two parties did not have comparable status and power in the negotiations, and that the essence of the agreements — providing a financial contribution in return for fishing opportunities — was not dramatically different from the previous FAs. It will be necessary to monitor how these opinions evolve over the course of implementation of the FPAs.

3.2.1 Financial contribution and partnership actions

Contribution per tonne of tuna compared with market prices

For FPAs to represent a ‘partnership’, countries should receive a fair price (or market price) for their resources. In the case of tuna, this can be evaluated by the price per tonne of tuna that the coastal state receives, compared to the market value of a tonne of tuna. This can also be compared to the price that other countries pay for licences per tonne of tuna.

Figure 3-1 illustrates how the total contribution per tonne of tuna (based on utilisation of the reference tonnage), made up of a contribution from the EU and ship-owner licences, increased gradually from €75 per tonne in the 1980s and has remained at around €100 per tonne since the early 1990s. Introduction of the FPAs has not changed this amount, although the proportion paid by the shipowners has steadily increased (see Section 3.3).

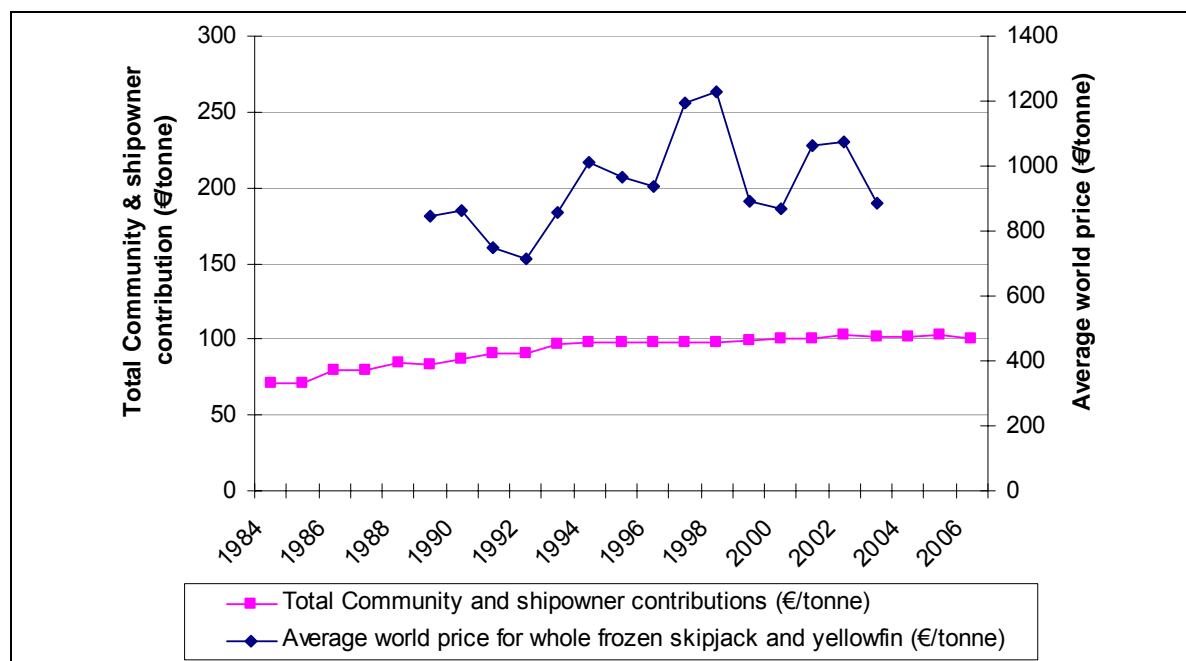


Figure 3-1 Comparison of the total community and ship owner contribution for tuna (€/tonne) with the world market price for whole tuna (skipjack and yellow fin) (€/tonne)

Note: Pre-1998 market price data was converted from USD to EUR using 1998 exchange rate.

Source of market price data: Catarci, C. 'The World Tuna Industry-An analysis of imports and prices, and of their combined impact on catches and tuna fishing capacity'. FIU, FAO.

During this time the average world price of tuna (from purse seiners) fluctuated considerably, but maintained an average price of around € 900 per tonne (US\$ 1000, worth approximately € 770 at current exchange rates). As such, for purse seine opportunities, the EU is paying between 11–13% of the market value of tuna (Table 3-2).

Prices of tuna from long-line vessels are much higher, reaching around € 4,750 per tonne. On this basis, the EU payments (which are the same per tonne of tuna, regardless of whether it is longline or purse seine-caught), are around only 2% of the market value of the tuna.

In comparison, Japan and Korea pay approximately 6% of the market value of their tuna catch under agreements in the Pacific Ocean (FFA, *pers. comm.*). Since most of their catch is from longliners (for the high-grade sushi and sashimi markets), they would therefore be paying a higher price per tonne of tuna (possibly up to €250–300 per tonne). The US pays a fixed fee for access under the US-Pacific multilateral treaty, which in 2003 was US\$ 21 million for 16 purse seine vessels. US catches in 2003 under the agreement were 94,003 tonnes (Mwikya, 2006). Taking an average market price of US\$1,000 per tonne for purse seine catch, this equates to 22% of the catch value.

Table 3-2 Percentage of tuna market value paid by EU, Japan and US under fishing agreements

	Indicative tuna market value per tonne (€)	Price paid per tonne (€) ¹	% of market value paid by EU
EU Purse seine (under an FPA)	770	100	13 %
EU Longline (under an FPA)	4,750	100	2 %
Japanese longliners ²	4,750	--	6 %
US vessels under Pacific treaty ³	770	--	22 %

¹ For the EU, this is the total EU payment (i.e. contribution plus shipowner contributions)

² Information from FFA, personal communication, 2007

³ Calculated from information from Mwikya (2006)

Overall, the EU seems to be paying a fair rate for tuna fishing opportunities, in particular for purse seine catches. The EU pays more, per tonne, for purse seine catches than Asian DWF nations, but less per tonne for longline catches. They pay less than the US for purse seine catches. The EU approach to paying a fixed rate per tonne, rather than a rate based on the market value, also has the advantage of protecting coastal states from the significant fluctuations in price of tuna on world markets (Figure 3-3). However, the coastal state may be missing out on far greater potential economic benefits from their fishery resources through value-added processing.

3.2.2 Transparency and policy dialogue

With coastal states

A key part of ongoing policy dialogue and transparency is sharing information between the EU and the coastal state. Before the EU negotiates a new agreement, a detailed ex-post evaluation is undertaken of the previous agreement, and an ex-ante evaluation of the forthcoming agreement. These studies, commissioned by DG Fish and conducted by external consultants using in-country data collection and interviews, should look not only at the impact on the Community, but also the potential impact on the local economy. The latter, however, has been covered to varying degrees in the ex-ante evaluations.

In the spirit of partnership, these evaluations should be shared with the coastal state prior to negotiations so that the negotiations can be undertaken based on full participation and knowledge from both sides. Sustainable Impact Analyses undertaken by DG Trade prior to negotiations on Economic Partnership Agreements have often been made public through publication on the EU website. The extent to which the FPA evaluations have been shared with coastal states during negotiations has been variable, and is difficult to find out for all cases, although the EC reports the evaluations are now systematically shared with coastal states. However, the evaluations for FPAs are not readily accessible in the public domain and have proved very difficult to obtain for consultants, NGOs and other donors. A more formal process of request would help greatly with transparency.

The introduction of ex-ante evaluations is a positive move by the EU towards more responsible agreements. Table 3-3 illustrates for the case study countries where it is known whether evaluations have usually been shared with the coastal states, but there is still some way to go to ensure they are shared before the negotiations and there is sufficient trust that the country believes it has received the full version.

Table 3-3 Review of transparency FPA negotiations for case study countries

Country (dates of FPA)	Ex-ante evaluation shared
Mauritania (2006-2012)	✓ Shared during negotiations
Mozambique (2007-2011)	✓ Shared, but Mozambique authorities were not sure they received the full version
Seychelles (2006-2012)	× Shared, but only after negotiations
Solomon Islands (2006-2009)	✓ Shared
Senegal (negotiation for a FPA beyond 2006)	✓/× EC shared the evaluation with Senegal, but enquiries for the case study indicated people from the Ministry believed they had not received it. Negotiations were not successful.

The evaluations are not in the public domain, although summaries are often given within the 'Legislative Financial Statement' which is annexed to the Proposal for a Council Regulation on the conclusion of a fishing agreement (specific protocol), and are available publicly on the EU's EurLex website. These summaries usually only include a qualitative

analysis of impacts on the local economy and do not fully consider the costs and benefits for the coastal state. The ex-ante and ex-post evaluations themselves assess impacts on the local economy to varying degrees (see Table 3-4).

Whilst there is a need for the Commission to be transparent in its negotiating procedures with coastal states, the latter should also be transparent in relation to information on the fisheries: the fishing opportunities available, best available knowledge on the state of the stocks and the current overall effort on the stocks under negotiation, including effort from both national and other foreign fleets. Use of the best available information from both sides is essential from the viewpoint of sustainability particularly since many mixed fisheries are in a data-poor situation .

Table 3-4 Examples of the consideration of local impacts in ex-post and ex-ante evaluations

Country	Evaluation type	Consideration of local impacts
Cote d'Ivoire	Ex-post evaluation of FA	Includes employment generated on vessels and on land, and estimate of value-added from EU vessels' use of port services
Kiribati	Ex-post evaluation of FA	Includes discussion of the impacts on Kiribati, value added, benefits and costs
Mauritius	Ex-post evaluation of FA	Analysis of the impacts on Mauritius' economy
	Ex-ante evaluation of new agreement	Includes cost-benefit analysis of different scenarios
Mozambique	Ex-post evaluation of FA	Qualitative evaluation of the impacts on Mozambique

With Member States

A number of EU Member States have concerns over the EU's fisheries agreements and are keen to ensure that FPAs fulfil their expectations. The Commission shares the evaluations with the Member States and involves them in coordination meetings for the negotiations. However, Member States should contribute more to the negotiations and the decision of whether the EU signs a particular FPA in their responsibilities to the European taxpayers. There have been concerns expressed that the ex-ante evaluations and draft agreements are not shared with Member States in sufficient time prior to the signing of agreements, so that any comments may be taken into account. Nevertheless, as a matter under the Common Fisheries Policy, the Commission acts with exclusivity and can take decisions without the agreement of Member States.

3.2.3 Shared review of the agreements

Joint monitoring of the agreements (through Joint Committees)

A Joint Committee has been a feature of the fisheries agreements since their inception; however it did not usually meet unless requested by the EU or the coastal state. Under the FPAs, it is stipulated that the Joint Committee will meet at least once per year, as well as on request of either party (Table 3-5). The Joint Committees also have a broader remit under the FPAs than under the FAs, now being responsible for monitoring the implementation of the agreements and the implementation of partnership actions and reassessing the fishing opportunities where necessary. A Joint Committee meeting has recently been held (January 2007) concerning the Seychelles FPA, and it will be important to track the progress and outcomes of the other committees.

Table 3-5 Indication of whether the agreements provide for joint monitoring (i.e. a Joint Committee - JC) of the implementation of the agreements

Country	FA	FPA
Cape Verde	✓ (JC meets on request)	✓ (JC meets annually)
Comoros	+/- (JC) ¹	✓ (JC meets annually)
Cote d'Ivoire	✓ (JC meets on request)	✓ (JC meets annually)
Gabon	✓ (JC meets on request)	✓ (JC meets annually)
Greenland	✗ (Parties shall hold consultations)	✓ (JC meets annually)
Guinea-Bissau	✓ (JC meets annually)	✓ (JC meets annually)
Kiribati	✓ (JC meets on request)	✓ (JC meets annually)
Madagascar	✓ (JC meets on request)	✓ (JC meets annually)
Mauritania	✓ (JC meets on request)	✓ (JC meets annually)
Micronesia	--	✓ (JC meets annually)
Morocco	✓ (JC meets annually)	✓ (JC meets annually)
Mozambique	✓ (JC meets annually)	✓ (JC meets annually)
São Tomé & Príncipe	✓ (JC meets on request)	✓ (JC meets annually)
Seychelles	✓ (JC meets on request)	✓ (JC meets annually)
Solomon Islands	--	✓ (JC meets annually)

1. The Joint Committee in Comoros is not to monitor the agreement, but 'to consult over questions arising in connection with the implementation and proper working of this Agreement'.

-- indicates that there was no agreement.

The responsibilities of the Joint Committee, for example in Mauritania, include the monitoring of the implementation of the agreement; settlement of disputes; and review of the contribution of the agreement to implementation the sectoral fisheries policy. The FPAs also specify that the Joint Committee will be a forum for cooperation on defining and implementing a sectoral fisheries policy.

The Parties shall cooperate with a view to defining and implementing a sectoral fisheries policy in [country] and shall to that end initiate a policy dialogue on the necessary reforms. They hereby undertake not to adopt measures in this area without first consulting each other.

There are benefits to this requirement, in the sense that the EU's contributions to development and implementation of a fisheries policy can be assessed (see Section 4.8), but the case studies also indicated that some countries were concerned with the perceived 'loss of sovereignty' through the EU's involvement with national fisheries policy (Section 3.8.1).

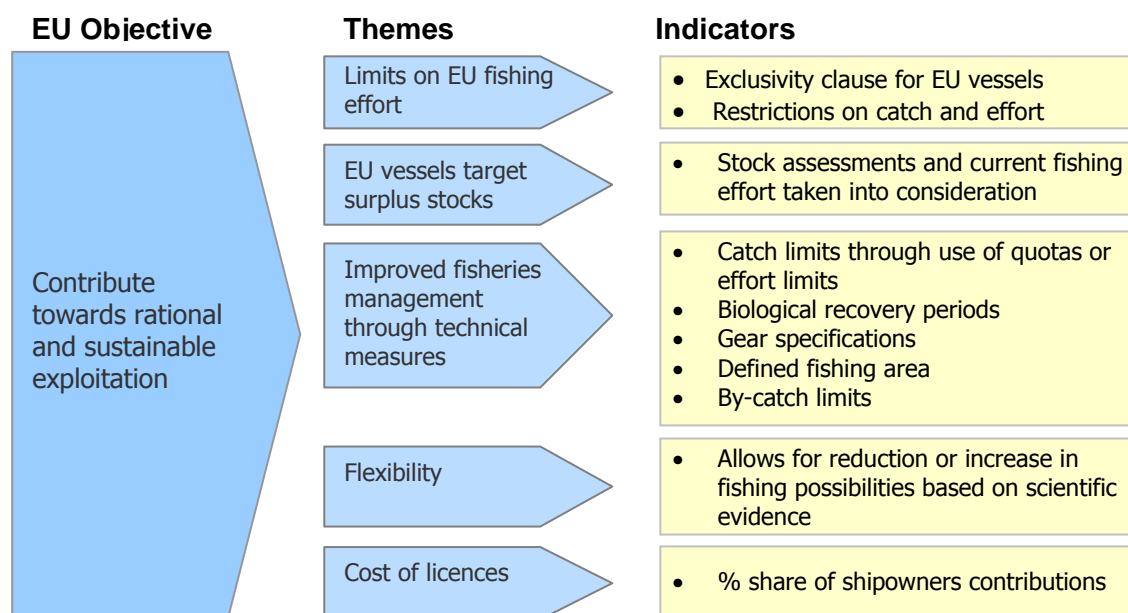
Indicators reflect EU and developing country concerns

The indicators selected to monitor the implementation of the agreement should reflect the concerns both of the EU and the coastal state concerned. This should also be the case for monitoring the implementation of the financial contribution provided to support the development and implementation of fisheries policy. The FPAs require the two countries to agree to objectives for measuring progress and annual and multi-annual programmes of work. The proposed regulation for Mauritania's FPA includes a detailed breakdown of these objectives (see Section 5.1.6), whereas a number of other agreements leave this to the Joint Committee to develop.

It will be important to publicly evaluate these objectives and indicators when they are developed, to assess whether they are measuring improvements that will benefit the coastal state and reflect the objectives within the Council Conclusions such as transparency; sustainable fisheries, reduction in IUU fishing and support for local development and the local economy. They should also be used for internal EU evaluations,

rather than more narrowly defined indicators indicated in proposed council regulations which often focus on the financial performance of the agreement and its contribution to employment and market provision for the EU.

3.3 Contribute towards rational and sustainable exploitation



The EU is, to a certain extent, dependent on the fisheries management of the partner countries to ensure rational and sustainable exploitation of stocks. Weak governance, poor enforcement and corruption in coastal states can make delivering the Council conclusions very difficult. Whilst the EU could choose only to sign agreements with countries with a track record of fisheries management, in practice many agreements will be with countries where fisheries management structures are weak. Nevertheless, provisions within the FPAs could help ensure that, as far as possible, the EU is contributing towards rational and sustainable exploitation, and supporting the coastal states in reaching these goals.

3.3.1 Limits on EU effort

Exclusivity clause for EU vessels

The FPAs concluded after the 2004 Council Conclusions have seen the introduction of an exclusivity clause, as illustrated in Table 3-6. This means that EU vessels must have a licence issued under the FPA to be able to fish in the coastal state's EEZ, removing the chance of private arrangements. The exceptions are the agreements in the Pacific including Federated States of Micronesia and the Solomon Islands (both negotiated before the Council Conclusions), and the FPA with Gabon (negotiated after the Council Conclusions). The fisheries agreement with Mauritius (2003–2007) also includes such an exclusivity clause although this was agreed before the new FPA model was introduced.

The exclusivity clause only applies to other EU vessels and does not prevent the country from agreeing fisheries agreements with other countries or private sector companies (outside of the EU).

Table 3-6 Introduction of the exclusivity clause

Exclusivity agreement included in:	Cape Verde	Comoros	Cote d'Ivoire	Gabon	Guinea (FA)	Guinea Bissau	Greenland	Kiribati	Madagascar	Mauritania	Mauritius (FA)	Micronesia	Morocco	Mozambique	São Tomé & Príncipe	Senegal	Seychelles	Solomon Islands
FA	x	x	✓	x	x	x	x	x	x	x	✓ ¹	--	x	x	x	x	x	--
FPA	✓	✓	✓	✓	--	✓	✓	✓	✓	✓	--	x	✓	✓	✓	--	✓	x

1 Mauritius' FA (2003–2007) was negotiated after the *Integrated Framework for Fisheries Partnership Agreements* (2002), and incorporates some FPA elements.

Notes: Countries with an FA (i.e. no FPA) are shaded grey.

Restrictions on catch and effort

A number of criticisms have been made of EU fishing agreements because they do not always include effective limitations on fishing effort, or on catches. Limiting catches through the use of quotas is a possible way of controlling fishing, but catch monitoring must be good for this to be effective. Some examples where catches have been limited through the use of tonnage quotas (see Table 3-6) include:

- Restriction of shrimp catches in Angola to 5,000 tonnes/year in the 2000-2002 and 2002-2004 Protocols;
- Restriction of deep water shrimp catches in Mozambique to 1,000 tonnes/year in the 2004-2006 Protocol (although these opportunities were not taken up);
- Restriction of pelagic catches in Morocco to 60,000 tonnes/year in the recent FPA.

Whilst quota systems may be the best approach to managing some fisheries, they are inadvisable where catch monitoring and enforcement are weak, as is the case in many developing coastal states. In such circumstances, effort limitation is more practical and this is the approach taken in most FAs and FPAs.

Fishing opportunities in FAs and FPAs are usually determined by number of vessels (for tuna fishing) or gross registered tonnage (GRT) or more recently gross tonnage (GT) for demersal fishing. Basing fishing opportunities on GT or GRT is preferable to basing them on the number of vessels, since fishing effort can be better restricted. Basing fishing opportunities on GRT rather than number of vessels provides greater flexibility and may be more profitable for the EU. For example the proposed council regulation for the Cote d'Ivoire 2000-2003 agreement stated that: *'The protocol offers fishing opportunities for demersal species in GRT rather than in terms of vessels, which should allow for greater flexibility. It also allows for more fishing opportunities to be offered in practice'*. This was also repeated in the proposed regulation for the EU-Senegal Protocol 2001-2006 with states, *'no limit on the number of vessels will allow for more availability and great flexibility of use. This should make the Protocol more profitable.'*

However, GRT and GT are a poor measure of actual fishing capacity. The use of tonnes of GRT is also an obsolete method of calculating fishing effort which contravenes international recommendations aimed at promoting sustainable fishing (UNEP, 2002) This report goes on to explain that estimations of catches are based on vessels that existed 10-20 years ago rather than their current form fitted with sophisticated gear and fishing materials with a much higher 'fishing power' (a function of both a vessel's size and engine

power (FAO, 1999a)). GRT and GT are no longer used within EU fisheries as a means of measuring fishing capacity or restricting fishing effort. Better measures of fishing capacity, such as power, could be used to better control fishing effort under the FPAs and to bring the measures used in line with those used within EU waters.

Table 3-7 Basis of financial contribution (GRT, no vessels, tonnage of fish)

Country	Date	Type of Fishing Possibilities	Financial contribution based on			Catch limit	Comments
			GRT	No of vessels	Tonnage of Fish		
Cape Verde	2006-2012	Tuna	x	✓	✓	x	
Comoros	2005-2010	Tuna	x	✓	✓	x	
Côte d'Ivoire	2007-2013	Tuna	x	✓	✓	x	
Gabon	2005-2011	Tuna	x	✓	✓	x	
Greenland	2007-2012	Mixed	x	x	✓	✓	
Guinea-Bissau	2007-2011	Mixed (shrimp, fin-fish & cephalopods)	✓	✓	x	x	
		Tuna	x	✓	x	x	
Kiribati	2006-2012	Tuna	x	✓	✓	x	
Madagascar	2007-2012	Tuna	x	✓	✓	x	
Mauritania	2006-2008	Tuna	x	✓	x	x	Maximum total allowable catch for pelagic freezer trawlers is 440,000 t.
		Pelagic freezer trawlers	x	✓	x	x	
		Cephalopods	✓	✓	x	✓	
		Others (Crustaceans, Black hake trawlers, Demersal, Lobster, Non-freezer pelagic vessels)	✓	x	x	x	
Micronesia	2006-2009	Tuna	x	✓	✓	x	
Morocco	2006-2010	Tuna	x	✓	x	x	
		Small-scale pelagic (sardine, anchovy etc)	✓	✓	x	x	
		Small-scale bottom Longliners (demersal)	✓	✓	x	x	
		Small-scale line, pole, traps (demersal)	✓	✓	x	x	
		Demersal fishing	✓	✓	x	x	
		Industrial Pelagic fishing	✓	✓	✓	✓	Restricted to 60,000 t per year and 10,000t per month
Mozambique	2004-2006 (FA)	Tuna	x	✓	✓	x	
		Deep-water shrimp	x	✓	✓	✓	1,000 tonnes a year and 535 tonnes of by-catches
	2007-2011 (FPA)	Tuna	x	✓	✓	x	
São Tomé	2006-2010	Tuna	x	✓	✓	x	
Seychelles	2005-2011	Tuna	x	✓	✓	x	
Solomon Islands	2006-2009	Tuna	x	✓	✓	x	

Most tuna agreements refer to a 'reference tonnage' but this is not a limit on catches. It is merely the tonnage of tuna that the financial contribution is based on. If catches are higher than this amount, the EU — and the shipowners through licences — pay extra for the

additional tonnage caught. In some agreements the extra amount that can be paid in any one year is restricted to two or three times the value of the agreement, any excess can only be paid the following year. For tuna catches taken under FPAs within ICCAT and IOTC areas, EU vessels are actually taking the Community quota as established by the regional management organisation.

The mixed agreements, such as Morocco and Mauritania, allow for fishing opportunities to be increased, with the agreement of the Scientific Committee or Joint Committee, up double the amount of the financial contribution established in the Protocol.

3.3.2 EU vessels target surplus stocks

Stock assessments and current fishing effort taken into consideration

The application of the complementarity principle in UNCLOS (1982) should involve:

- Assessment of stock levels per targeted species;
- Estimation, on the basis of scientific studies, of the level of sustainable harvest for each species; and
- Determination of the balance or 'surplus' which could be attributed to foreign fishing boats in the form of licence of specific quantities of target species (see Section 3.1 for definition of surplus).

The ex-ante evaluations are normally not made public and no established system exists for requesting the documents from the Commission. This makes it difficult to assess whether the fishing possibilities agreed by EU and the coastal state have been based on rigorous stock assessments or available scientific information. It is possible, however, to assess this for the countries where ex-ante evaluations were made available and based on interviews undertaken for the case study countries (Table 3-8).

Reliable stock assessments are rarely available, which presents a problem both for the EU and for the coastal state. The EU needs to know that the resources they are paying for access to will yield sufficient returns for their fleets. In contrast, the coastal state has a responsibility to FAO and other international bodies to carry out sustainable management based on the precautionary principle.

The EU often has difficulty in assessing the state of the stocks as the information may be considered confidential by the coastal state, and would give an indication of catches from non-EU vessels. Coastal states are not always transparent about agreements they may have with other distant water fishing nations, and it can be difficult to assess the true total effort on a particular stock. However stock assessment and effort information are normally more readily available where there is a regional body with the responsibility for regional management, such as for tuna where the IOTC collates data and information on all catches. From the other perspective, coastal states also at times find it difficult to access catch data from the EU who may have been fishing in their EEZ for a number of years and could potentially have the best data set for a stock assessment.

Whilst stock assessments and evaluation of fishing capacity are important to ensure that fisheries resources are exploited within their biological limits, economic aspects of fisheries exploitation must also be taken into consideration. Even if a fishery is exploited within biologically sustainable limits, the fleet is not necessarily economically viable. The wealth-based approach to fisheries management argues that rather than focussing on production objectives and the direct benefits from fisheries for employment and livelihoods, management should focus on maximising the contribution that fisheries can make to economic growth — fisheries resources represent a source of sustainable wealth for countries. Decisions then have to be taken on how to generate or capture that wealth, how

to distribute it and how to use it. In this way, fisheries can benefit society beyond those individuals involved in the fisheries sector, through investing wealth in public services and infrastructure, or allocating fisheries use rights specifically to the poor. The potential value of fisheries resources and the wealth they could contribute to a country should also be considered in fisheries management, but this is rarely the case.

Table 3-8 Indication of whether EU fishing agreements have been based on scientific information and stock assessments

Country	Stock Assessment	Comments
Cote d'Ivoire ¹	<p>A new tuna-only FPA was signed for 2007-2013. The ex-ante evaluation for the previous 2004-2007 mixed FA indicated the following issues: The status of the coastal resources is poorly known. There are indications that demersal species are over-exploited and tuna species are fully- or over-exploited. No stock assessments for shrimp or cephalopods.</p> <p>Demersal species:</p> <ul style="list-style-type: none"> - Four of the main species are over-exploited and the recommendation is to reduce effort <p>Tuna/Tuna like (ICCAT conclusions)</p> <ul style="list-style-type: none"> - The state of Skipjack tuna is unknown but there may be some localised over-exploitation - Yellow-fin tuna is fully exploited and effort should be stabilised at sustainable levels (and protection of juveniles) - Big-eyed tuna is in a state of over-exploitation and there should be limit on capture (and protection of juveniles) - Sword-fish: currently at a sustainable level but effort levels should not be increased (and protection of juveniles) - Blue marlin: stocks have been over-exploited for many years <p>Shrimp and cephalopods:</p> <ul style="list-style-type: none"> - No stock evaluations have been undertaken 	<p>Despite this, in the 2004-2007 FA, fishing possibilities were increased for demersal trawlers, which might also be targeting shrimp. The numbers of tuna vessels were reduced.</p> <p>In 2007, a new tuna-only FPA was negotiated for 2007-2013, avoiding the issues highlighted here of the previous mixed agreement.</p>
Kiribati ²	The proposed council regulation for the agreement with Kiribati commented that ' <i>several scientific studies and institutions confirm that the status of tuna stocks, particularly for skipjack and yellowfin, is good and therefore an increase in the fishing effort in admissible</i> '.	The allocation of fishing licences under the FPA is compatible with the Palau Arrangement to limit purse seine effort in WCPO, but there are some concerns that the lack of limits on longline effort may threaten big eye and swordfish stocks.
Mauritania	<p>CNROP³ reported in 1998 that there needed to be a 25% reduction of fishing pressure on cephalopods⁴, but in 2001 the number of licences for EU vessels was increased from 42 to 55.</p> <p>The IMROP working group (which brings together international experts on Mauritanian fisheries every four years) estimates that there is currently excessive capacity of 31% in the octopus fishery, which is the cause of a 20% loss in production⁵.</p>	<p>Octopus fishing possibilities are still being offered to the EU fleet but have been reduced in the current FPA to 43 licences. However this is still in excess of the number of licences in the 1996-2001 protocol.</p> <p>The exploitation of prawns has been stopped on the advice of IMROP and other policy makers.</p>
Morocco ⁶	<p>Moroccan fisheries research suffers from a lack of resources to enable it to complete its research programmes, particularly from the environmental standpoint. Information is particularly lacking for pelagic and benthic species.</p> <p>This is despite the €34 million per year for institutional support and scientific research that Morocco received under the 1995-1999 FA, the highest contribution for targeted actions of any EU fisheries agreement.</p>	Financial contribution from the FPA may allow fisheries research to carry out more systematic stock evaluation programmes (pelagic/benthic species), although the total financial contribution and the amount directed at the fisheries sector will be less than under the previous FA.

Mozambique	Stock assessments by the Mozambique Research Institute (IIP) indicate that shallow water shrimp is fully exploited; a surplus is available for deep-water prawn ⁷ .	In the 2004–2006 FA, the Community sought access to shallow-water shrimp, but the resource was already fully exploited (by national fleet and small-scale fishermen) ⁸ . Instead, the FA provided opportunities for deep-water shrimp which were not utilised. No shrimp opportunities are included in the FPA.
Seychelles ⁹	IOTC recommendations indicate: Skip-Jack : Possibly under exploited Yellow-fin : Exploited near MSY and effort should not be increased. EC trawlers also target juveniles which could have an impact on the population Blue-eye tuna : Effort levels should be reduced and protection of juveniles Sword fish : Effort levels should be reduced	Tuna licences were decreased in the recent FPA, but the reference tonnage has increased from 46,000 tonnes to 55,000 tonnes.
Solomon Islands	The regional Palau Arrangement for purse seine tuna fishery sets maximum effort levels based on a regional stock assessment for tuna.	The current effort levels are within the Palau limits, but the FPA allows for an increase in fishing possibilities. This will have to be agreed first within the Palau framework before it is implemented.

Notes:

1. Source: *Ex-ante evaluation of the 2004-2007 fishing agreement*: Oceanic Développement, Poseidon Aquatic Resource Management Ltd and MegaPesca Lda (2006) Evaluation *ex-post* du protocole d'accord de pêche entre la Côte d'Ivoire et la Communauté européenne, et analyse de l'impact du futur protocole sur la durabilité, incluant une évaluation *ex-ante*.
2. Source: Proposed council regulation for the agreement with Kiribati; & *Ex-ante evaluation for EU/Kiribati agreement 2003-2006*: Oceanic Développement, Poseidon Aquatic Resource Management Ltd and MegaPesca Lda (2006) Evaluation of the current Protocol to the Fisheries Agreement between the European Community and the Republic of Kiribati.
3. Source: National Centre of Oceanographic Research and Fisheries – now known as the Mauritanian Institute of Oceanographic Research and Fisheries, IMROP.
4. Source: Mauritania case study.
5. Source: CFFA & Pechecops (2006) Mauritania EU Fisheries Partnership Agreement: What impacts on fisheries sustainable development in Mauritania? (August 2006).
6. Source: Proposal for a Council Regulation on the conclusion of the Fisheries Partnership Agreement between the European Community and the Kingdom of Morocco. Brussels, 23.12.2005. COM(2005) 692 final.
7. Source: Relatório Anual 2003. Instituto Nacional de Investigação Pesqueira, Maputo, Moçambique. [*Annual Report, 2003. National Institute for Fisheries Research, Maputo, Mozambique*].
8. Source: Mozambique case study.
9. Source: *Ex-ante evaluation of the 2006-2012 FPA*: Oceanic Développement, Poseidon Aquatic Resource Management Ltd and MegaPesca Lda (2004) Evaluation *ex-post* du protocole d'accord de pêche entre les Seychelles et la Communauté européenne, et analyse de l'impact du futur protocole sur la durabilité.

Many coastal states base their stock assessments on information from the Nansen programme, from stock assessments carried out several decades ago. The state of the stocks has undoubtedly changed in the interim, yet the resources are not made available to update these stock assessments. In other cases, it could be argued that commercial interests are backed where the state of the stock is unknown and the precautionary principle is not applied.

3.3.3 Improved fisheries management through technical measures

See also Section 3.3.1, Limits on EU effort, concerning improved fisheries management through catch and effort limits.

Biological recovery periods, gear specifications, defined fishing areas and by-catch limits

Additional technical measures, such as gear restrictions, by-catch limits and defined fishing areas are considered to contribute towards sustainable fisheries management. Figure 3-2 illustrates whether additional technical measures have been included in current and previous fisheries agreements. These are more detailed in some protocols where the specific measures are broken down for each species. However, the converse, may also be true, such as in the Mauritania agreement where tuna is considered as one group although some tuna species are under more pressure than others.

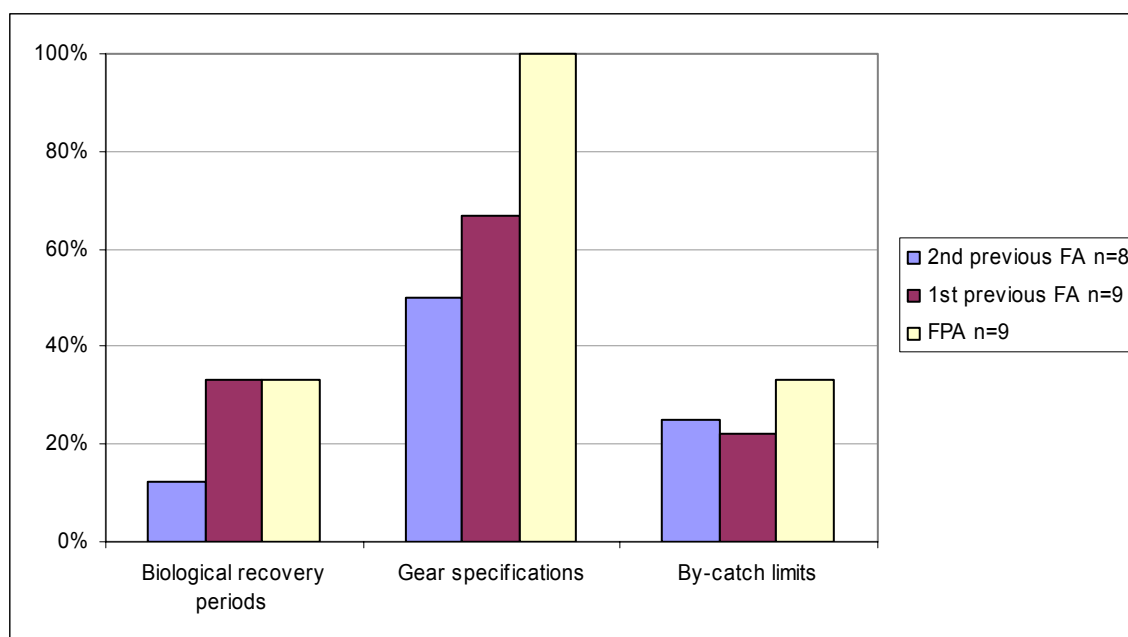


Figure 3-2 Comparison of inclusion of technical measures in current Fisheries Partnership Agreements (FPA) and two previous Fishing Agreements (FA).

Notes:

- (1) This information is based on countries where it is possible to compare current FPAs with two previous FAs: Cape Verde, Comoros, Gabon, Guinea-Bissau, Madagascar, Mauritania, Morocco, Sao Tome & Principe, Seychelles.
- (2) Biological recovery periods: This is only applicable to mixed agreements of which there were 4 for 2nd previous FA, 5 for 1st previous FA and 3 for the FPA.
- (3) Information for the '2nd previous' FA for Morocco (1992-1995) was not available. There therefore only 8 '2nd previous FAs', rather than 9.
- (4) By-catch: The number of agreements with by-catch limits in the two previous FA is the same (2 agreements) – the proportions appear different due to the sample size.

Biological recovery periods

Biological recovery periods are only relevant to mixed fisheries agreements, and concern only five out of the nine agreements considered in this graph: Guinea-Bissau, Mauritania and Morocco, and Cape Verde and Gabon (for the 2nd previous and 1st previous FA; their FPAs are tuna-only). They have been included in the three mixed FPAs and the first previous FA for these three countries. Looking back two agreements, biological recovery was only included as a technical specification in the Mauritanian agreement.

Gear specifications

There has been an improvement on the inclusion of gear specifications. This is mainly due to the increasing reference to the technical requirements of regional bodies within tuna agreements, such as the IOTC in the Comoros and Seychelles agreements and the Palau Agreement in the Micronesia and the Solomon Islands FPAs. However, in terms of their

technical detail, a number of the gear specifications have remained the same, for example between the Mauritanian FA and FPA, mesh sizes were changed only for lobsters and black hake trawlers.

By-catch limits

There has also been a slight improvement on by-catch limits, but reference to them in FPAs remains low. However, if these measures are included within regional agreements for tuna fisheries, the agreements require vessels to adhere to them. Concerning mixed agreements, by-catch limits were only previously specified for all the Mauritania and Guinea-Bissau agreements, and have recently been included in the Morocco FPA. By-catch limits were also specified for the Mozambique deep-water prawn fishery for the 2004-2006 FA, although these opportunities were never exploited by EU vessels.

Zoning

Most FAs and FPAs included zones where the EU vessels were not allowed to fish. These usually included the 12nm territorial seas, which were reserved for local small-scale fleets. Restricting access to commercial vessels from these areas helps minimise conflicts between the different fleets. These restricted zones increased over time; the very early FAs often included only a 3nm restricted zone, and only for some vessels. In the Mauritanian FPA a new restricted zone was defined for cephalopods and an extended restricted zone for surface long-liners.

3.3.4 Flexibility

Allows for reduction or increase in fishing possibilities based on scientific evidence

All FPAs include a clause which allows the fishing opportunities in the agreements to be revised in the light of scientific evidence. In this case, the financial contribution is also increased or reduced proportionately. It is important for the agreements to be flexible and to be able to respond to changes in stock status. However, the fear of losing part of the financial contribution may cause coastal states not to reduce fishing opportunities even if there are signs that the stocks are over-exploited.

Table 3-9 Indication of whether the previous FA and the FPAs provide for revision of the fishing opportunities available

Revision of fishing opportunities provided for in:	Cape Verde	Comoros	Cote d'Ivoire	Gabon	Guinea Bissau	Greenland	Kiribati	Madagascar	Mauritania	Micronesia	Morocco	Mozambique	São Tomé & Príncipe	Seychelles	Solomon Islands
FA	✓	✓	✓	x	✓	x/✓ ¹	✓	(✓) ²	✓	--	x	✓	x	✓	--
FPA	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

¹ The Greenland FA allows for adjusting the compensation in proportion to the supplementary quota provided by Greenland, and the parties may propose amendments to the protocol, but it does not specify revision of fishing opportunities.

² The original Agreement with Madagascar provides for the Protocol and Annexes to be amended. No mention is made in the Protocol.

There are few examples of where a reduction in fishing effort has been undertaken within an agreement. Mauritania is one of the few countries to have put this flexibility into practice, recognising the potential long-term threat to cephalopod resources of over-exploitation and

consequently restricted opportunities for cephalopod fishing. Licences for cephalopods during the 2001-2006 Mauritanian FA were decreased from 55 to 50 licences in 2005, in line with scientific advice on the level of exploitation of the species.

There have also been changes in fishing opportunities between different protocols. For example the 2006-2011 Cape Verde agreement incorporated a 28% reduction in tuna fishing possibilities compared with the previous agreement, with the reference tonnage falling from 7,000 tonnes to 5,000 tonnes. The total number of licences dropped from 117 to 84. However, this may have also been influenced by the utilisation rates where the use of licences for tuna seiners had been only 56% between 2002 and 2004.

3.3.5 Cost of licences

Percentage share of shipowners' contributions

There has been and remains considerable debate over whether the access payment made in fishing agreements and fisheries partnership agreements represent a subsidy paid for by states or regional groupings. In economic terms, subsidies reduce the operating costs of fishing vessels so that fishing effort is increased. Fishing agreements have been considered as a possible form of subsidy in that the access rights are paid for out of public funds (e.g. EU FAs and FPAs) and not directly by the fishing operators. This may also be the case where DWF vessels would not have fished in the waters without a fishing agreement.

Nevertheless, there is growing consensus in the World Trade Organisation (WTO) that government-to-government transfers are not considered as subsidies. However, fishing vessels operating within the framework of fishing agreements may still be receiving direct and indirect financial support (such as through the EU's previous Financial Instrument for Fisheries Guidance, FIG, or the new European Fisheries Fund, EFF) which may be found to conflict with WTO rules and international trade law.

The proportion of the costs paid by the shipowners is significant as an on-going criticism of the EU has been that costs to the shipowner do not account for the true cost of fishing. It may be found that access agreements only constitute subsidies where shipowners do not pay the full market rate for fishing opportunities. It is difficult to assess what the 'market rate' is, in particular because the form of payment by shipowners under FPAs is different from an annual licence fee with unlimited catches allowed, and a more in-depth study would be needed on this matter.

However, it is useful to look at: whether the EU shipowner contribution has been increasing (in absolute terms); whether it has increased as a proportion of the total financial contribution; and whether it is comparable to rates paid by other distant water fleets under private arrangements or access agreements.

Figure 3-3 illustrates how the average shipowner contribution to the cost of accessing tuna has increased from €20 per tonne (from the years 1984 through to 1998 to €35 per tonne in recent years (2006)). The average across all agreements is currently €34 per tonne because there are a few agreements where the shipowners still pay €25 per tonne.

The proportion of the total contribution that is paid by the shipowners (for tuna) has not increased uniformly over time (Figure 3-3). This is because Community contributions were initially lower, and have increased considerably from an average of €50 per tonne up to €80 per tonne in 1992. The shipowner contribution has now regained a share of 35% in most FPAs (€35 per tonne to the EU's €65), but will need to increase further in order to

deliver on the objective outlined in the reform of the Common Fisheries Policy: Roadmap⁷ which states that, ‘owners of the Community vessels benefiting from [such] Agreements should progressively assume greater responsibility for the financial compensation paid to partner countries in exchange for fishing rights’.

However, in some cases it appears that EU shipowners still pay less than the market rate for licences under an FPA; they pay less than other countries’ vessel owners for licences, and less than EU shipowners purchasing a licence privately outside an FPA (see Solomon Islands and Mozambique case studies in sections 4.4 and 4.5).

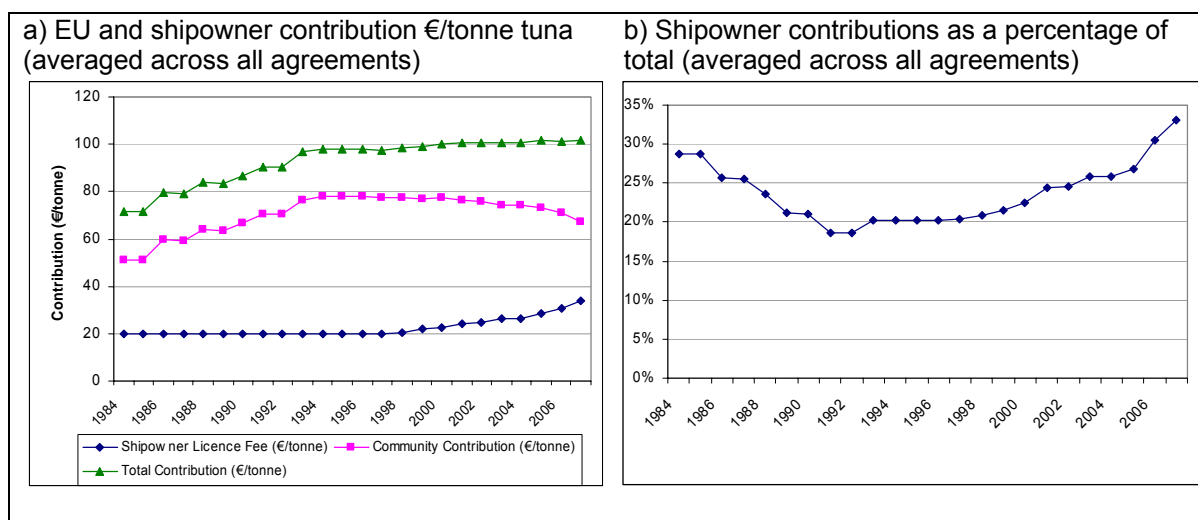
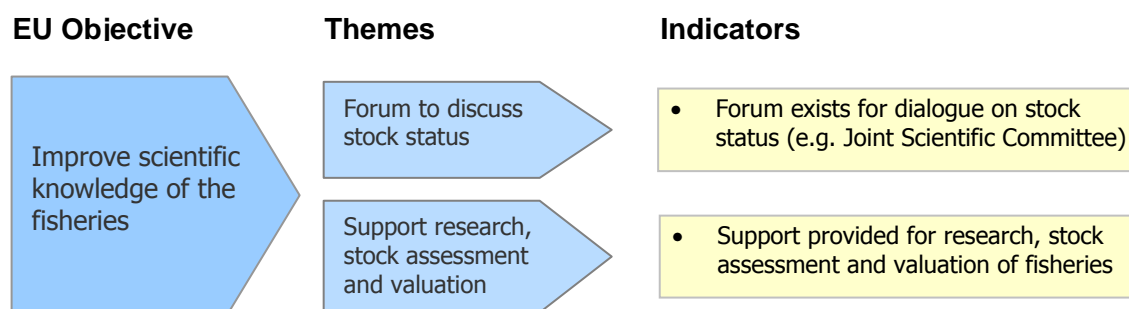


Figure 3-3 Average Community and shipowner contributions for access to tuna resources (€/tonne), drawn from twelve EU fishing agreements

Notes: Graphs produced using data from the following countries: Cape Verde, Comoros, Cote d'Ivoire, Equatorial Guinea, Gabon, Kiribati, Madagascar, Mauritius, Micronesia, Sao Tome & Principe, Seychelles and the Solomon Islands.

⁷ COMMUNICATION FROM THE COMMISSION on the reform of the Common Fisheries Policy ("Roadmap" COM(2002) 181 final Brussels, 28.5.2002

3.4 Improve scientific knowledge of fisheries in question



3.4.1 Forum to discuss stock status

An improvement of the FPAs over the FAs has been the introduction of Joint Scientific Committees (JSC) with the responsibility to annually review the state of the stocks in question and advise the Joint Committee on whether a reduction or increase in fishing possibilities would be recommended. The composition of the JSC is not specified, but it is important that it should include fisheries economists in addition to stock assessment scientists. Indications of scientific collaboration are given in Table 3-10.

In some agreements considerable responsibilities have been given to the JSC, such as defining gear specifications or by-catch limits which may have been fixed in previous agreements. In these cases it is even more important that this committee meets and is functional, otherwise these measures would not be defined or applied.

3.4.2 Support to research, stock assessment and valuation

Another potential indicator is whether the fishing agreement provides support for fisheries research and stock assessments. Given the new structure of the FPAs where support is given to developing or implementing a policy for sustainable fisheries, specific support to research will depend on the allocations made by the coastal state. The EU may be able to encourage allocation to research through the discussions on the objectives and performance indicators to measure progress of the policy, and the annual and multi-annual programmes developed to achieve this.

It will be possible to evaluate this in the future by assessing the financing that is allocated to research and stock assessment from the multi-annual plans.

In some agreements considerable responsibilities have been given to the JSC, such as defining gear specifications or by-catch limits which may have been fixed in previous agreements. In these cases it is even more important that this committee meets and is functional, otherwise these measures would not be defined or applied.

Table 3-10 Indication of whether the FAs and FPAs provide for scientific collaboration between partners to assess the state of the stocks

Country	FA	FPA
Cape Verde	×	✓ Consult within JC or in a scientific meeting
Comoros	×	✓ No JSC, but consult within JC
Cote d'Ivoire	✓ JSC to meet annually	✓ Consult within a scientific meeting before the JC where necessary
Gabon	×	✓ Consult within JC or scientific meeting and at sub-regional meetings
Greenland	×	✓ JSC reports on TORs at request of JC
Guinea-Bissau	✓ Joint scientific meeting to be held annually in Brussels	✓ Joint scientific meeting annually
Kiribati	×	✓ No JSC, but consult within JC
Madagascar	×	✓ Consult within JC or scientific meeting
Mauritania	✓ JC reviews state of stocks	✓ Independent JSC meets annually
Micronesia	--	✓ Joint scientific meeting when necessary
Morocco	× ¹	✓ Joint scientific meeting annually
Mozambique	×	✓ Scientific working group
São Tomé & Príncipe	✓ (annually, for crab resources)	✓ Consult within JC or in a scientific meeting and at sub-regional meetings
Seychelles	×	✓ Joint scientific meeting annually
Solomon Islands	--	✓ Joint scientific meeting when necessary

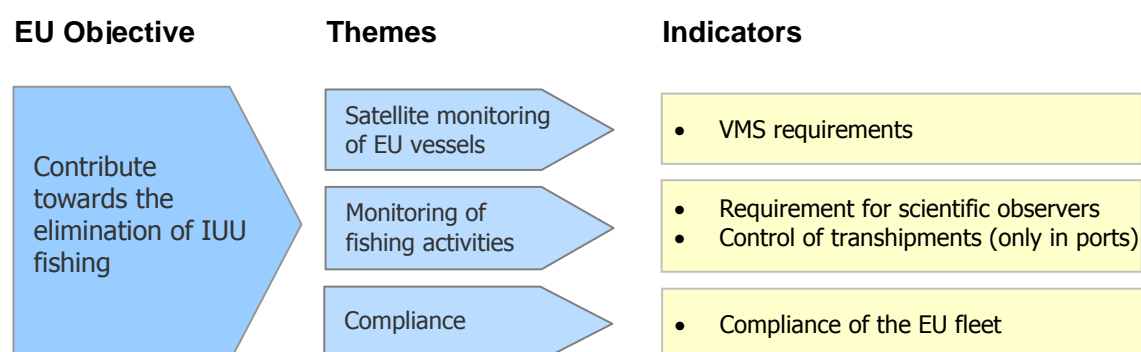
1 Provides for stepping up 'scientific and technical cooperation' but no specific forum for discussing scientific assessments of the stocks

3.4.3 Support to research, stock assessment and valuation

Another potential indicator is whether the fishing agreement provides support for fisheries research and stock assessments. Given the new structure of the FPAs where support is given to developing or implementing a policy for sustainable fisheries, specific support to research will depend on the allocations made by the coastal state. The EU may be able to encourage allocation to research through the discussions on the objectives and performance indicators to measure progress of the policy, and the annual and multi-annual programmes developed to achieve this. It will be possible to evaluate this in the future by assessing the financing that is allocated to research and stock assessment from the multi-annual plans.

3.5 Contribute towards the elimination of IUU fishing

The following indicators have been selected to illustrate and measure the contribution of FPAs to the elimination of IUU fishing.



3.5.1 Satellite monitoring of Community vessels

VMS requirements

Most FPAs now require EU vessels to use VMS. However, there are still issues concerning access to information from the system. In most agreements, the arrangements are for the information to go first to the flag state, i.e. the EU Member State (as this is an exclusive sovereignty right of flag states), and then transferred to the coastal state authorities within 2 hourly intervals.

In practice, there have been a number of problems with the transfer of VMS information and in some coastal states, VMS systems do not exist for the MS authorities to be able to transfer VMS data. In Mozambique, there were problems with the security of data transfer, so the VMS system has not yet been operational. In the Pacific, the FFA has established a regional VMS system with centralised reporting. Solomon Islands subscribes to the FFA VMS, but the Solomon Islands FPA does not require EU vessels to use the established system, and instead maintains VMS reporting to the flag state, contrary to national legislation. This hinders the usefulness of the VMS system for monitoring vessel activity and enforcement by the coastal state. While use of the regional system is required for Kiribati and Micronesia FPAs, these FPAs include the option to develop an alternative agreement on VMS. There have also been reports that EU vessels are not currently reporting directly to the regional VMS system (Rodwell, 2007). The recent FPAs with Guinea-Bissau and Cote d'Ivoire do not include a requirement for VMS, although there are provisions for this to be developed once the coastal state authorities have put in place the necessary systems.

3.5.2 Monitoring of fishing activities

Scientific observers

Although observers are required within nearly all the EU fishing agreements (and current FPAs), a number of them are only 'at the request of the coastal government authorities'. Some of the exceptions to this are the current Mauritania, Moroccan and São Tomé agreements where observers are required.

A review of the requirements for observers within the current FPAs is given in Table 3-12.

Table 3-11 Incorporation of VMS Protocols in agreements

Country	Date	VMS requirements	Change since previous agreement	
Cape Verde	2006-2011	✓ Flag state to report VMS information at 3 hr intervals	↑	Previously no inclusion of VMS
Comoros	2005-2010	✓ Flag state to send VMS info to coastal state at 2 hr intervals	↑	Previously no inclusion of VMS
Côte d'Ivoire	2007-2013	VMS arrangements will be made once Cote d'Ivoire establishes system	→	Previously included support for setting up VMS system
Gabon	2005-2011	✓ Flag state to send VMS information at 2 hr intervals	↑	Previously no inclusion of VMS
Greenland	2007-2012	✓	↑	Previously no inclusion of VMS
Guinea (FA)	2004-2008	× No requirement for VMS	→	
Guinea Bissau	2007-2011	× Joint Committee will define VMS once technical requirements in place	→	Previously included support for setting up a VMS system
Kiribati	2006-2012	✓ VMS Protocol exists but not implemented until Kiribati establishes control centre	→	EU vessels required to comply with regional VMS until a joint agreement reached
Madagascar	2007-2012	✓ Flag state to send VMS information at 3 hr intervals	↑	Previously Community vessels to be monitored by satellite under conditions agreed by the Parties
Mauritania	2006-2012	Support given to rectifying problems with VMS system	→	
Mauritius (FA)	2003-2007	Support for setting up VMS system	→	
Micronesia	2006-2009	✓ Required to comply with regional VMS but a clause to allow alternative arrangements	--	
Morocco	2006-2010	✓ Flag state to report VMS information at 2 hr intervals	↑	Previous agreement included a private satellite-tracking project for Community vessels
Mozambique	2007-2011	✓ Flag state to send VMS info at 2 hr intervals (currently not functional)	↑→	VMS to be agreed in a separate protocol (Protocol not implemented)
São Tomé & Príncipe	2006-2010	✓ VMS Protocol exists, will be implemented when Sao Tome establishes control centre	↑→	Assistance for VMS
Senegal	2002-2006	Support for a VMS system	↑→	Previously no inclusion of VMS
Seychelles	2005-2011	✓ Flag state to report VMS information at 1hr intervals	↑	Previously no inclusion of VMS
Solomon Islands	2006-2009	No requirement for VMS	--	--

↑ Situation improved in FPA compared to FA

→ Situation the same in FPA as in FA

↑→ Slight improvement in FPA compared to FA

Table 3-12 Requirements for observers in FPAs

Country	Date	Observer requirements	Change since previous agreement	
Cape Verde	2006-2011	Regional observers at the request of the Regional Fisheries Organisation (RFO)	↑	Previously at the request of the coastal state
Comoros	2005-2010	At the request of the Comorian Ministry	→	
Côte d'Ivoire	2007-2013	Regional observers at the request of the competent authority (for tuna)	→	At the request of the coastal state (not for tuna)
Gabon	2005-2011	Regional observers on the request of the RFO	→	Tuna: on request of Gabonese authorities
Greenland	2007-2012	Yes, as required by Greenland law	→	
Guinea (FA)	2004-2008	Required on all trawlers and when indicated on tuna vessels	→	
Guinea Bissau	2007-2011	Trawlers – yes, on request by Guinea-Bissau; Tuna – no, regional observer system to be agreed	→	Required on trawlers and on request for tuna vessels
Kiribati	2007-2012	Regional observers on request of WCPFC*	→	On at least 20% of all fishing trips (2003-2006 agreement)
Madagascar	2007-2012	Regional observers on request of coastal state	→	
Mauritania	2006-2012	Required on trawlers and on request for tuna vessels	↑	Previously not required for tuna vessels
Mauritius (FA)	2003-2007	May be request for vessels above 50GRT	→	
Micronesia	2006-2009	Required but determined by FSM authorities	--	
Morocco	2006-2010	Required and allocated by the authorities	↑	Previously at request of authorities
Mozambique	2007-2011	IOTC-designated observers	↑	
São Tomé & Príncipe	2006-2011	Regional observers on request of the competent authority	↑	Previously only for experimental crab vessels
Senegal	2002-2006	Required	→	
Seychelles	2005-2011	Observers appointed by Seychelles authorities	→	
Solomon Islands	2006-2009	Observers appointed by Solomon Island authorities	--	

* Western and Central Pacific Fisheries Commission

Control of transshipments

Fish that have been caught illegally may be transhipped onto reefers (fish transport vessels) before being landed. Complex networks of reefers, companies and ports help obscure the origin of IUU fish, facilitating its entry onto world markets. Therefore monitoring transshipments can help control the trade in illegal fish.

The incorporation of controls on transshipments in FAs and FPAs is shown in Table 3-13. The FPAs specify that transshipments must only be carried out 'in port' or 'in designated areas' to facilitate monitoring by authorities. However, these controls only apply to transshipments carried out in the EEZ of the coastal state. Vessels can still leave the EEZ and tranship on the high seas with no monitoring or controls.

Table 3-13 Controls on transhipment in FAs and FPAs

	Date	Controls on transhipment	Change since previous agreement	
Cape Verde	2006-2011	Prohibited at sea or penalties apply. In Cape Verde ports only; Catch declarations required	↑	No restriction
Comoros	2005-2010	Prohibited at sea or penalties apply. In Comorian ports only; Catch declarations required	↑	Must give consideration to Comorian port facilities for any transhipment
Côte d'Ivoire	2007-2013	Prohibited at sea or penalties apply. In Ivorian ports only; Catch declarations required	↑	No restriction
Gabon	2005-2011	Prohibited at sea or penalties apply. In Gabonese ports only; Catch declarations required	↑	No restriction
Greenland	2007-2012	Not mentioned in Agreement or Protocol. National legislation applies	→	
Guinea (FA)	2004-2008	No restriction	→	No restriction
Guinea-Bissau	2007-2011	Prohibited at sea. Only in Ports.	→	No restriction
Kiribati	2006-2012	Prohibited at sea or penalties apply. In Kiribati ports only; Catch declarations required	→	Prohibited to tranship at sea. Fleet must tranship at least 3 times per year in Kiribati ports.
Madagascar	2007-2012	Prohibited at sea or penalties apply. In Madagascar ports only; Catch declarations required	↑	No restriction
Mauritania	2006-2012	Only in Mauritanian ports. Prohibited at sea or penalties apply. Catch declarations required. Can refuse to IUU vessels	→	Only in Mauritanian ports or designated transhipment points. Prohibited at sea or penalties apply. Catch declarations required. Can refuse to IUU vessels; Freezer trawlers must tranship at least 15 times
Mauritius (FA)	2003-2007	No restriction	→	No restriction
Micronesia	2006-2009	Only able to tranship in designated ports. Prohibited to tranship at sea	--	
Morocco	2006-2010	Prohibited at sea or penalties apply; only able to tranship in designated ports or areas with an observer; catch declarations required; able to refuse IUU produce.	↑	Prohibited at sea or penalties
Mozambique	2007-2011	Prohibited at sea only in ports or penalties apply.	↑	Required in ports for shrimp
São Tomé & Príncipe	2006-2011	Prohibited at sea; only in ports or penalties apply. Catch declarations required	↑	No restriction
Senegal	2002-2006	Prohibited at sea or penalties apply. In Senegalese ports only; Catch declarations required	↑	No restriction
Seychelles	2005-2011	Prohibited at sea or penalties apply. In Senegalese ports only; Catch declarations required	↑	No restriction
Solomon Islands	2006-2009	Prohibited at sea or penalties apply. In Solomon Island designated ports only; Catch declarations required	--	--

3.5.3 Compliance

Whilst the provisions in FPAs have improved (and the provisions in FAs had been improving over time), contributing towards more sustainable and responsible fisheries, and combating IUU fishing, what happens in practice is not always what is set out in the agreement. There have been several cases of EU vessels and Member States not complying with the regulations set out in the agreements.

Compliance of the EU fleet

Examples of EU vessels not complying with the regulations can be drawn from the case studies and ex-ante/ex-post evaluations:

- **Not providing entry and exit notices:** In Mozambique the EU vessels were not providing entry and exit notices. This was also reported as a problem in Madagascar and Mauritius. (Source: ex-post evaluation for Mauritius.)
- **Providing incomplete catch declarations:** In some cases the catch declarations are not properly filled out, such as not disaggregating by species. (Source: ex-post evaluation Mozambique 2004-2006.)
- **Not fulfilling landing or transshipment duties:** the Kiribati agreement has had a low utilisation and as a result there have been no landings or transshipments into Kiribati ports (officially a contravention of the agreement as there should be three transshipments per year), no entry or exit notices and limited catch declarations were given to the authorities. (Source: ex-ante evaluation of Kiribati agreement 2003-2006.)
- **Not employing national or ACP seamen:** Under Mauritius; 2003-2007 FA, ten Mauritian seamen should 'embark on the EC fleet'. However, at the time of the ex-post evaluation, no Mauritian seamen had been employed on EC boats, nor had compensation been received. (Source: ex-post evaluation for Mauritius.)

One of the concerns of coastal states is that they do not know whether the catch declarations made by EU vessels are accurate or not. In cases where they do not receive VMS information or entry and exit notices from the vessels, they do not know which vessels should be making catch declarations for any particular day. This is exacerbated for tuna fisheries (which most FPAs now focus on exclusively), because these fisheries take place in the EEZ far from shore, and therefore are difficult for coastal states to monitor, because they usually have very limited MCS capacity for sea patrols or air surveillance. In addition, without regular inspections by local inspectors there are limited checks on the actual quantities and species caught, including by-catch. By the same token, Coastal states, when they do receive logbooks, have little capacity to process them. There is even more limited information on discards.

It can generally be maintained, however, that it will be in the interests of EU vessels fishing in an area to support the application of effective MCS to protect the waters from illegal fishing from other nations. For example, there was much concern raised during the evaluation of the 2000-2003 Guinea fishing agreement that 'fisheries protection and control measures in Guinea are inefficient and have not succeeded in reducing illegal fishing'⁸.

Compliance of the Member States

A recent report on the control procedures of the Member States under the CFP concluded that the situation remained generally unsatisfactory. Satellite-based Vessel Monitoring Systems were highlighted as one of a number of sensitive areas that represent a high risk for non-compliance. There was found to be a lack of compliance by fishermen, and a

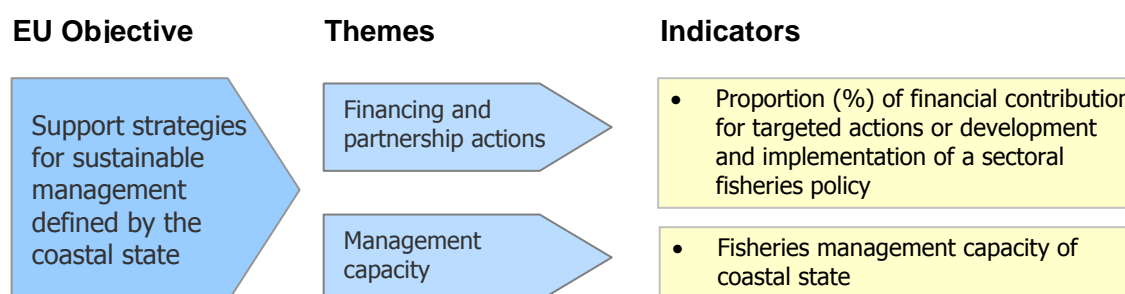
⁸ Proposed council regulation for the 2004-2008 Guinea agreement, 2003

failure to cross-check VMS data with that recorded in vessel logbooks (CEC, 2007). These issues are of even greater concern to coastal states who are one step removed from the control process and rely on Member States to monitor and control their vessels' activities, and report VMS data to them.

Not providing catch declarations to the coastal state, or providing them late (beyond the 45 day period after the end of a fishing campaign that is usually established) is the main compliance issue involving Member States that has arisen repeatedly in the evaluations:

- **Not providing catch declarations:** initially in the 2004-2006 Mozambique agreement, catch declarations were not being submitted to the Mozambique authorities. When they were submitted, they were extremely late, beyond the 45 day period after a fishing campaign specified in the agreement. However, towards the end of the agreement, this problem seemed to be resolved and the catch reports were being submitted on time. Even an EU vessel that did not have a licence submitted a catch declaration, and was later arrested for fishing illegally (Source: Mozambique case study).
- **Providing catch declarations late:** Mauritian authorities were concerned at the late submission of catch declarations from EU vessels (Source: ex-post evaluation for Mauritius).

3.6 Support strategies for sustainable management



3.6.1 Financing and partnership actions

Structure of the financial contribution, partnership actions and targeted actions

Support for development and implementation of national fisheries policies

Under the previous fisheries agreements, the EU paid a financial compensation sum, based on the fishing opportunities made available to the EU fleet, and stipulated that a certain amount be put towards 'targeted actions', specifying the quantities to be spent on different areas (e.g. small-scale fisheries, monitoring and control, training, participation in international meetings, research, etc.). Occasionally an extra sum was made available for specific actions, such as a stock assessment or experimental fishing for a particular stock that the EU was interested in starting to exploit.

For the FPAs, the EU makes a clear distinction between the financial contribution paid in return for the fishing opportunities, and a specific additional allocation in support of the national fisheries policy. This is a new addition to the FPAs concluded after the Council Conclusions of 2004. The aim of this is to contribute towards promoting responsible fishing in the EEZ waters. Of the total financial contribution (the sum of these two figures), the coastal state then decides what proportion to put towards activities 'for defining and implementing a fisheries policy for sustainable fisheries' (the replacement for the targeted actions in the FAs). In all cases, this is greater than the allocation made by the EU in support of fisheries policy. In other words, the value put towards actions in the fisheries sector is not just the contribution from the EU to support fisheries policy, but also part of the financial contribution for fishing opportunities.

For example, in Cape Verde, the financial contribution paid is €325,000 per year for the opportunity to fish 6,000 tonnes of tuna (€65 per tonne). A further €60,000 is paid to support sustainable fisheries. Of the total (€385,000), the Cape Verde government decided to allocate 80% (€308,000) to implementing actions to promote sustainable fisheries, which is more than the €60,000 EU contribution for sustainable fisheries.

The Council Conclusions on the integrated framework for FPAs⁹, specify that the financial contribution should be defined according to the following:

- All fishing opportunities accessible to Community fishing vessels in the light of the best scientific opinion available and better knowledge of the state of the fisheries and of the fishing effort deployed by both national and foreign fleets;
- Pinpointing action to promote the sustainable development of fisheries, in particular action to improve the scientific and technical evaluation of the fisheries concerned;

⁹ COM(2002) 637 final

- Monitoring and supervision of fishing activities, hygiene requirements and the business environment of the sector; and,
- The impact of the partnership agreement as well as the participation of European interests on the partner coastal State's fisheries sector as a whole, with regard to its aspirations towards development under rational and sustainable economic and social conditions and to its commitment to implementing a sustainable fisheries policy in the interest of both Parties.

The FPAs that do not include an additional allocation are Comoros, Seychelles, Micronesia and Solomon Islands (negotiated before the 2004 Council Conclusions), Mauritania and Morocco (valuable mixed agreements where the financial contribution is already large). Guinea-Bissau is also a relatively valuable (€7m) agreement. It does not include an additional allocation for fisheries policy, but it does include an extra €500,000 per year for improving sanitary and phyto-sanitary conditions in the fisheries sector, a crucial prerequisite to be able to export fish and fisheries products to the EU market.

Figure 3-4 (a) and (b) provides a comparison of the amounts of financial compensation provided in exchange for fishing opportunities, and the extra financial contribution made under FPAs for 'support for responsible fisheries' in current FPAs and the previous FAs. The amount that the coastal state agreed to put towards targeted actions (FAs) or support to implementing a sectoral fisheries policy — 'partnership actions' (FPAs) is also indicated.

Greenland, Guinea-Bissau, Mauritania, Morocco and Seychelles are shown separately (Figure 3-4 (b)) because the financial contributions for these agreements (€ 125 million per year for Morocco's 1995–1999 fisheries agreement, € 86 million a year for Mauritania, €42 million for Greenland, €10 million for Guinea-Bissau and € 4.1 million for Seychelles' 2005-2011 Protocol under the FPA) are very large relative to the other agreements. The total amount of Morocco's financial contribution reduced considerably between the 1995 protocol and the 2006 FPA, due mainly to reduced fishing opportunities. Mozambique is included on both graphs because of the large difference in financial contribution between the FA and the FPA.

In Morocco's FPA, the EU provided no specific funds for supporting fisheries policy, but Morocco allocated 37 % of the total, or € 13.5 million per year, towards implementing a sectoral fisheries policy, an absolute decrease but a proportionate increase from the amount put towards targeted actions under the FA. For Seychelles, again no specific contribution was made for supporting fisheries policy, but this may be due to the fact that the Protocol in force (2005-2011) under the FPA was originally agreed under the previous FA, when there was no provision for providing money in addition to the compensation for fishing activities. The Protocol has since been renegotiated and is due to come into force in January 2008. The amount put towards implementing a sectoral fisheries policy by the coastal state is slightly greater under the FPA than the FA. In Mauritania, the overall value of the FPA is the same as the previous FA, but € 11 million is indicated as the contribution for actions in the fisheries sector. This is more than the amount directed at targeted actions in the FA.

Detailed values for financial contribution for all the FPAs, and the previous FAs, are provided in Table 3-14. In most cases, the proportion of the total financial contribution put towards 'sectoral fisheries policy' has increased compared to the proportion put towards targeted actions in the FAs (Cape Verde, Comoros, Gabon, Madagascar, São Tomé & Príncipe, Mauritania, Morocco and Seychelles). In some cases both the proportion and the value of financial contribution put towards sectoral fisheries policy has increased compared to the targeted actions in FAs (Gabon and Madagascar). In other cases, the proportion of financial contribution put towards sectoral fisheries policy has increased compared to targeted actions, but a significant decrease in the overall value of the agreement means

that the value put towards sectoral fisheries policy is less than the amount that was put towards for targeted actions (Morocco and São Tomé & Príncipe).

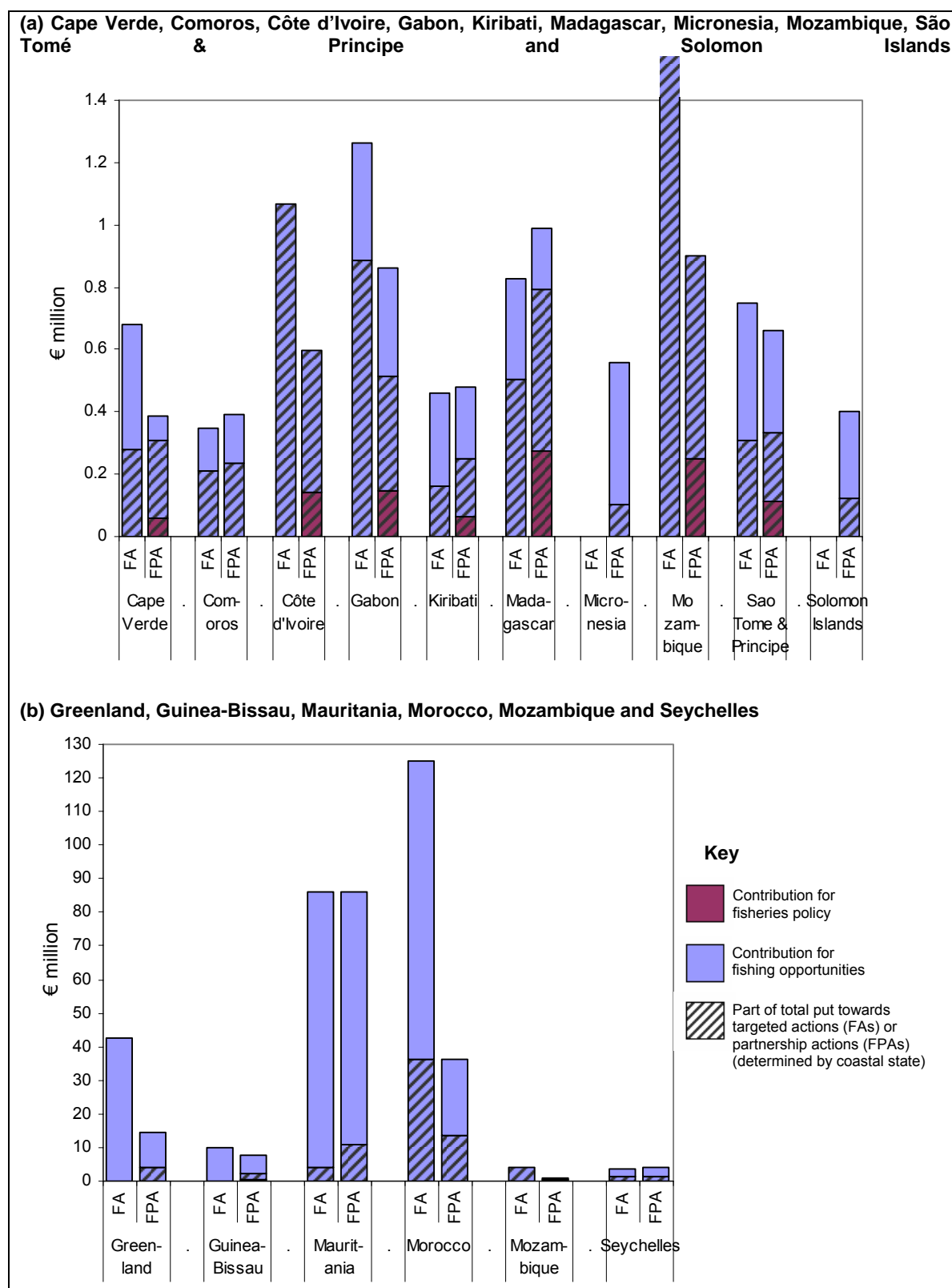


Figure 3-4 Breakdown of financial contribution and indication of the proportion put towards targeted actions or sectoral policy under selected fisheries agreements and FPAs

Note: Mozambique is included in both graphs because of the large difference in financial contribution between the two agreements

Table 3-14 Financial compensation and contributions, amounts specified for targeted actions and sectoral fisheries policy for FPAs and FAs

Country	FPA / FA	Community contributions				Amount allocated by coastal state to fisheries policy		Comments
		For fishing opportunities (€/yr)	For support to fisheries sector (€/yr)	Total (€/yr)	Support to fisheries sector as % of total	% of total to sectoral fisheries policy	Value to sectoral fisheries policy (€/yr)	
Cape Verde	Previous FA	0.68	0	0.68	0	41%	0.28	
	FPA	0.325	0.06	0.385	15.6%	80%	0.308	Reduction in contribution under FPA due to loss of bottom longliners
Comoros	Previous FA	0.35	0	0.35	0	60%	0.21	
	FPA	0.39	0	0.39	0%	60%	0.234	Before Council Conclusions
Cote d'Ivoire	Previous FA	1.065	0	1.065	0%	100%	1.065	
	FPA	0.455	0.14	0.595	23.5%	100%	0.595	
Gabon	Previous FA	1.2625	0	1.263	0%	70%	0.884	
	FPA	0.715	0.145	0.86	16.9%	60%	0.516	
Greenland	Previous FA	42.8	0	42.8	0%	0%	0	
	FPA	14.31 (+1.54)		14.31 (+1.54)	0%	23% (28%)	3.26 (+0.79)	
Guinea-Bissau	Previous FA	10	0	10	?	10%	0.1	Compensation was revised to €7.26m/yr in 2004
	FPA	7	0 + 0.5	7.5	0%	35%	2.45	€0.5m provided for SPS* system or MCS
Kiribati	Previous FA	Av. 0.46	0	Av. 0.46	0%	22%	0.1	
	FPA	0.416	0.0624	0.478	15%	Av. 52%	Av. 0.25	PA = 30% in year 1, then 40% then 60%
Madagascar	Previous FA	0.825	0	0.825	0%	61%	0.505	
	FPA	0.8645	0.3325	1.197	27.8%	80%	0.9576	FPA was revised. Contribution was previously €0.99m/yr
Mauritania	Previous FA	86	0	86	0 %	5 %	4	
	FPA	75	11	86	13 %	13 %	11	€11m will be allocated to support fisheries policy.
Micronesia	Previous FA	n/a	--	--	--	--	--	
	FPA	0.559	0	0.559	0%	18%	0.1	Before Council Conclusions
Morocco	Previous FA	125	0	125	0%	29%	36.25	
	FPA	36.1	0	36.1	0%	37%	13.5	
Mozambique	Previous FA	4.09	0	4.09	0%	100%	4.09	
	FPA	0.65	0.25	0.9	27.8%	100%	0.9	
Sao Tome & Principe	Previous FA	Av. 0.75	0	Av. 0.75	0%	41%	Av. 0.31	
	FPA	0.55	0.1	0.663	15.1%	50%	0.331	
Seychelles	Previous FA	3.46	0	3.46	0%	33.5%	1.16	
	FPA (2005)	4.125	0	4.125	0%	36%	1.485	Protocol established under FA
	FPA (revised 2008)**	?	?	5.355	??	36%?	1.485?	FPA revised 2007. Contribution was €4.125m/yr.
Solomon Islands	Previous FA	n/a	--	--	--	--	--	
	FPA	0.4	0	0.4	0%	30%	0.12	Before Council Conclusions

* Sanitary and Phyto-sanitary

** Details of Seychelles revised FPA document not yet available

Evaluating support for national fisheries policies

How this money is to be spent is more flexible for the host country under the FPAs, allowing the country to identify the objectives and priorities for the fisheries sector policy (in consultation with the EU). There are plans for the coastal countries to agree multi-annual

guidelines and objectives with the EU but it is not yet clear what mechanisms will be used to achieve this in practice. There are some indications that in the Seychelles, for example, the government is less accountable for money that was pledged for support to the national fisheries policy within the FPA, compared to the evaluation of funds that were destined for targeted actions in the previous FA.

Whilst some countries prefer the increased flexibility offered by the 'partnership actions' approach in the FPAs (e.g. see Seychelles case study), others preferred the targeted actions approach because they felt reporting on the utilisation of the funds was more straightforward (e.g. see Mozambique case study).

The FPAs state that the coastal state authorities 'shall have full discretion regarding the use to which this financial contribution is put', (i.e. the actions in support of the sectoral fisheries policy and the remainder of the financial contribution). However, various objectives will be agreed between the two parties in the Joint Committee for the implementation of measures to develop and implement a sectoral fisheries policy. Nevertheless, if the coastal state is not seen to be achieving the results that would be expected from the amount of financing being directed towards the sectoral fisheries policy, 'the European Community may ask for the financial contribution to be readjusted with a view to bringing the actual amount of financial resources allocated to implementation of the programme into line with its results'. In other words, if the coastal state does not invest the funds in the fisheries sector and in promoting responsible fishing, then the proportion indicated for these actions will be revised to reflect the amount that is actually being reinvested in the sector. However, in reality, the EU has no authority over the use of the financial contribution.

3.6.2 Fisheries management capacity in coastal state

The money provided to coastal states through FAs and FPAs can help support fisheries management capacity by providing financial/budgetary support, for example, for fisheries administration, the purchase of MCS equipment, training courses for fisheries staff, and research and data collection activities.

However, there are concerns that:

- the impacts of this contribution may not be easy to evaluate;
- even if reinvested in the sector, there is no guarantee that it will contribute towards improving fisheries management¹⁰ as the coastal state has complete discretion in how the money is spent;
- improving fisheries management may require technical support beyond just injections of money;
- the involvement of the EU in setting fisheries policy could result in a conflict of interest;
- effective management might still be beyond the institutional capacity of the coastal state irrespective of investment from FPA contributions.

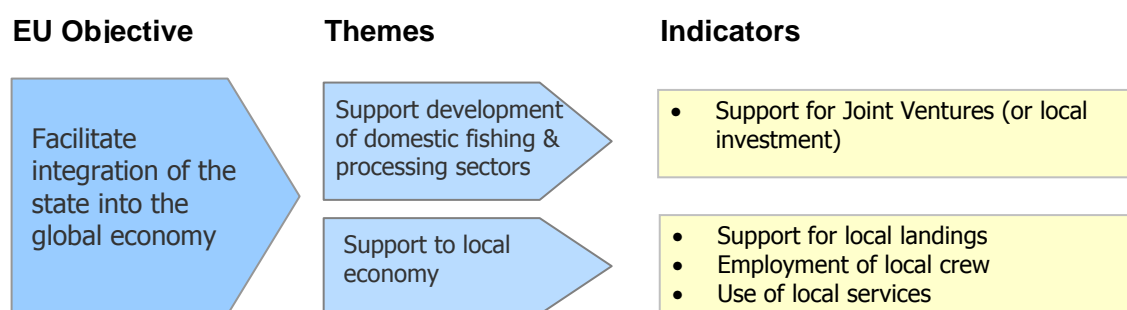
Fisheries agreements may not provide the right incentive to improve management and fisheries policy. They may in fact be a distraction to effective management, rather than an incentive, due to the steady stream of guaranteed income to the fisheries sector for several years. Improvements in fisheries management have been observed when countries actively decided not to sign fisheries agreements with the EU (Kelleher, 1997). Namibia chose not to sign an access agreement with the EU from the very start. Mozambique, after

¹⁰ For example, €1.2 million of the compensation from the 2004-2006 FA has been put aside for the construction of a new building for the Ministry of Fisheries in Mozambique.

having an access agreement with the EU for a few years, decided not to continue and instead to focus on developing its national fleet, although they later negotiated an agreement with the EU again. The result in both cases has been the formation of joint ventures, initiation of charter arrangements, increase in the national fleet capacity, greater control over levels of resource exploitation, an increase in the value of fish exports and the development of national fisheries plans and policies (Kelleher, 1997).

Coastal states need more support for stock assessment as they often lack the financial and human resources to carry out such work. In these cases, technical and expert advice is needed in addition to funding to carry out the data collection and analysis. Development-type support may be more effective and provide a better framework for providing financial support together with expert advice and capacity building.

3.7 Facilitate integration of the state into the global economy



The facilitation of the state into the global economy implies economic development and the ability of the coastal country to extract value and value-added from its fisheries sector. This might be achieved through building up its national fleet, developing or expanding the domestic processing sector, and increasing trade and exports in fisheries products.

The FPAs provide for some measures that may support the local economy, such as employment of local crew, incentives for local landings or encouragement to develop joint ventures. However, these are unlikely to provide significant support to help the state integrate into the global economy. Some countries (e.g. Seychelles) have been able to capture significant value-added through local landings and processing, whereas in other countries (e.g. Mauritania), few local landings take place due to inadequate infrastructure and the proximity to EU ports, resulting in minimal value-added being captured by the coastal state. Few fisheries agreements so far have helped coastal states develop their domestic fleets. Although the FPAs provide for encouraging joint ventures, it is not yet clear whether these will materialise in practice.

Furthermore, there are other external forces in action, in particular the current World Trade Organisation (WTO) negotiations to reduce tariffs, which would negatively impact on ACP countries. The ACP countries currently enjoy preferential access to the EU market (0% tariff). This preference would be reduced under the WTO proposals, as non-ACP tuna processors such as Thailand and Colombia become more competitive under lower tariff regimes applied to their exports to the EU. These external forces may counteract any positive contributions of the FPAs to coastal states' integration into the global economy.

3.7.1 Support development of domestic fishing and processing sectors

Most FPAs include a commitment to encourage an environment that is conducive to investment, and to encourage joint ventures and vessel transfers (Table 3-15). Joint ventures may be related to either the fishing or processing sectors, and may help build up local fleets and processing capacity to capture more value-added. They are viewed positively in many ACP states, but there are few examples how these aspects of the FPAs may be put into practice. The only example is the mechanism introduced into the last Guinea agreement, which provides reduced licence fees for joint venture vessels. There is no mention of incentives for investment in local processing industries.

Table 3-15 Support for Joint Ventures within FPAs

	Date	Support for Joint Ventures	Changes from previous FA	
Cape Verde	2006-2011	Encourage joint enterprises of mutual interest	↑→	Not mentioned
Comoros	2005-2010	Not mentioned	→	Not mentioned
Cote d'Ivoire	2007-2013	Encourage joint enterprises of mutual interest	↑	Not mentioned
Gabon	2005-2011	Encourage joint enterprises of mutual interest	↑	Not mentioned
Greenland	2007-2012	Encourage temporary joint enterprises for fishing with a view to supplying Community market	→	Temporary joint enterprises for fishing with a view to supplying Community market
Guinea (FA)	2004-2008	Promote joint ventures between Community operators and Guinean operators by giving priority and reduced licence fees	↑	Not mentioned
Guinea-Bissau	2007-2011	Encourage joint enterprises of mutual interest	↑	Not mentioned
Kiribati	2007-2012	Encourage joint enterprises of mutual interest	↑	Not mentioned
Madagascar	2007-2012	Encourage joint enterprises of mutual interest	↑	Not mentioned
Mauritania	2006-2012	Encourage environment favourable to investment	→	Encourage joint ventures
Mauritius (FA)	2003-2007	Not mentioned	→	Not mentioned
Micronesia	2006-2015	Encourage direct investment and joint enterprises in mutual interest.	--	
Morocco	2006-2010	Initiative to raise awareness among EU private economic operators of the commercial and industrial opportunities in Morocco's fishing industry	↑→	Encouraged development of joint-ventures
Mozambique	2007-2011	Two parties will support formation of joint ventures in their mutual interest	→	Encourage joint enterprises for fishing and related activities which may include transfer of vessels
São Tomé & Príncipe	2006-2010	Encourage joint enterprises of mutual interest	↑	Not mentioned
Senegal	2002-2006	Not mentioned	→	Not mentioned
Seychelles	2005-2011	Encourage joint enterprises of mutual interest	→	Not mentioned
Solomon Islands	2006-2009	Encourage joint enterprises and transfer of community vessels to joint enterprises	--	--

There is also some concern about how joint ventures may fit into sustainable management objectives, as vessels fishing under joint ventures would not count as EU vessels and

therefore would be exempt from the exclusivity clause and could fish outside the opportunities provided for in the FPAs. This may lead to an overall increase in fishing effort. All fishing effort should be part of a controlled management plan and in theory it should not matter whether that effort comes from a domestic fleet, joint ventures or fishing agreements with distant water fleets. However, where effective management capacity does not exist to establish effort limits and control access to the fishery, this may cause problems.

Furthermore, the Commission maintains that access agreements are the only way of ensuring policy integration and synergy and that private fisheries arrangements should be discouraged. In this case, it is incoherent to promote vessel transfers and joint ventures from within the FPAs, as they could undermine the comprehensiveness and exclusivity of FPAs.

There has not yet been time for joint ventures to be established via FPAs, and therefore it is not yet clear how this will be implemented and to what extent. There are some examples of joint ventures that already exist between EU countries and coastal states, although most of these have been established as a result of the **absence** of a fisheries agreement with the EU. For example, in 1993 when Mozambique decided to cancel the fisheries agreement with the EU, a joint venture was set up with the Spanish company Pescanova, to develop local fishing capacity.

Furthermore, the fisheries agreement with Angola was denounced by the EU because of changes to Angolan legislation that specified that fishing activities would have to be carried out in association with Angolan enterprises and the origin of fish would have to be Angolan (i.e. a joint venture). These changes were not acceptable to the EU and so the agreement was denounced. This suggests that the EU may not be willing, in practice, to enter into many joint ventures within the realm of the FPAs.

3.7.2 Support for the local economy

Support for local landings and use of local services

Various fishing agreements have made specifications requiring the participating vessels to land a proportion of their catch or by-catch in local ports. This is often to support local market supply and often applies to relatively low value species such as small pelagics or by-catch. In some cases it also includes requirements for landings of tuna species to support local processing industries (e.g. Senegal). The more recent FPAs have moved towards incentives for local landings (such as reduced licence fees) rather than compulsory landings (e.g. Gabon, Cape Verde and Madagascar), because compulsory landings are against free trade principles and could be challenged in the WTO.

Local landings can be beneficial for local food security (in the case of pelagics) or to supply local processing sectors, but there are some concerns that that foreign vessels landing large quantities of fish can distort local market prices with negative impacts on local fishers. The provisions for local landings in recent FAs and FPAs are shown in Table 3-16.

In some countries there are virtually no landings by EU fishing vessels. In the case of Mauritania there are specific reasons for this:

- Limited port facilities (Nouadhibou);
- Relatively high port costs (fuel and other supplies);
- Low port efficiency;
- Navigational problems (the presence of wrecks in Nouadhibou harbour);
- The proximity of other more competitive ports, e.g. Dakar (Senegal), Las Palmas (Spain), Dakhla (Morocco).

Table 3-16 Incentives for local landings in FAs and FPAs

	Date	Support for local landings	Change since previous agreement	
Cape Verde	2006-2011	Licence fee reduced by €5/tonne if catch landed in Cape Verde and an additional 5€/tonne if sold to local processing industries	↗	Previously encouraged to supply canning factories & 5% for surface long-liners (for transshipment)
Comoros	2005-2010	Not mentioned	→	Not mentioned
Cote d'Ivoire	2007-2013	Not mentioned	↓	Encouraged to land locally and contribute to supplying canneries
Gabon	2005-2011	Financial incentives for local landings: Licence fee reduced by €5/tonne if catch landed in Cape Gabon and an additional 5€/tonne if sold to local processing industry	↑	Previously not mentioned
Greenland	2007-2012	No requirements	→	No requirements
Guinea (FA)	2004-2008	Trawlers must land 200kg/GRT/year free of charge Joint-ventures to land all that is not destined for European markets	↑	Previously vessels could pay rather than land locally
Guinea-Bissau	2007-2011	Not mentioned	↓	Local landings required for fin-fish, cephalopods and shrimp trawlers or additional payment made with licence
Kiribati	2007-2012	No requirement	→	No requirement
Madagascar	2007-2012	Financial incentives for local landings Licence fee reduced by €5/tonne if catch landed and an additional 5€/tonne if sold to local processing industry	↑	Not mentioned
Mauritania	2006-2012	Financial incentives for local landings or transshipment (25% reduction of licence fee for landings and 15% reduction for transshipment)	→	Compulsory landings for demersal trawlers (up to 20 vessels); and financial incentive. At least 15 transshipments/year
Mauritius (FA)	2003-2007	No requirements	→	No requirements
Micronesia	2006-2015	Not mentioned	--	
Morocco	2006-2010	25% compulsory for pelagic vessels and 50% demersal caught in Morocco. Reduction in licence fee for other local landings	→	Previously compulsory for specified no. of cephalopods with financial incentives for others
Mozambique	2007-2011	No requirement for landings	→	Not mentioned (for 2004-7 agreement)
São Tomé & Príncipe	2006-2010	No requirement	→	No requirement
Senegal	2002-2006	Local landings required for 44-56% of tuna seiners (targets of 5,000t pole & line; and 12,500tonnes seiners); requirements for inshore demersal fishing or penalties apply	↗	Targets of 3,500 pole & line; and 12,500 tonnes seiners; requirements for inshore demersal fishing or penalties apply
Seychelles	2005-2011	Endeavour to land by-catch at local price and supply canneries	→	Endeavour to land by-catch at local price and supply canneries
Solomon Islands	2006-2009	No obligations	--	

Employment of local crew

Most agreements include the requirement to employ a certain number of local or ACP crew, providing employment. A number of recent agreements have changed the requirement from national crew to ACP crew, giving more flexibility to EU vessels. One of the reasons for this is because most FPAs are just for tuna, and having to drop off and collect local crew from ports for every country would represent a severe constraint on fishing activities. However, this also represents potentially less benefits for the coastal state as there is no guarantee of employment for nationals. The numbers required vary with each agreement and the extent of the fishing possibilities (Table 3-17).

Table 3-17 Requirements for employment of local crew

	Date	Employment of local crew	Change since previous agreement	
Cape Verde	2006-2011	Employ 3-6 ACP seamen for tuna vessels	↓	Previously 2-6 Cape Verdean nationals or pay wages
Comoros	2005-2010	Employ at least one local seaman	↑	No requirement
Cote d'Ivoire	2007-2013	Employ 20% ACP nationals on tuna fleet	↓	Employ 1-3 local seamen for trawlers; 4 for pole & line fleet; 30 for seiner fleet; and 4 for long-line fleet
Gabon	2005-2011	Employ 20% ACP nationals on tuna seiners and long-liners	↑	No requirement
Greenland	2007-2012	No requirement	→	No requirement
Guinea (FA)	2004-2008	Employ 2-4 Guinean seamen on Trawlers; 6 for the tuna seiner fleet; five for the pole & line fleet, two on long-liners	→	Employ 2-4 Guinean seamen on Trawlers; 6 for the tuna seiner fleet; five for the pole & line fleet, two on long-liners
Guinea-Bissau	2007-2011	Employ 3-6 Guinea-Bissau nationals on trawlers. No requirement for tuna fleet	↓	Employ 3-6 Guinea-Bissau nationals on trawlers; 7 for the tuna seiner fleet and 17 for the pole & line or long-line fleet
Kiribati	2006-2012	Sign on 6 ACP seamen on the seiner fleet, and 4 ACP seamen on the longline fleet.	→	Employ 2 Kiribati nationals as crew members or pay a lump sum
Madagascar	2007-2012	20% ACP crew for tuna seiners and long-liners	↓	At least 40 Madagascan nationals or pay compensation
Mauritania	2006-2012	2-12 Mauritanian seamen on trawlers; 1 on seiners; 3 on pole & line; and up to 50% on pelagic.	→	4-7 Mauritanian seamen on each vessel; 1 on seiners; 3 on pole & line;
Mauritius (FA)	2003-2007	10 Mauritian seamen for the fleet	↑	No requirement
Micronesia	2006-2015	At least one FSM national per vessel	--	
Morocco	2006-2010	From 2-8 seamen on most vessels (small pelagic voluntary)	→	Increasing number with GRT – required on all vessels 1-6 seamen
Mozambique	2007-2011	Employ 20% ACP crew	↑→	50% Mozambican on shrimp, no requirement on tuna vessels
São Tomé & Príncipe	2006-2010	Employ 20% ACP crew	↑→	No requirement
Senegal	2002-2006	50% Senegalese non-officer crew for trawlers, bottom long-liners and surface long-liners.	↑	33% Senegalese crew on trawlers and long-liners
Seychelles	2005-2011	Two Seychelles seamen per tuna seiner	→	Two Seychelles seaman per tuna seiner
Solomon Islands	2006-2009	Each vessel to employ at least 1 Solomon national or pay equivalent of two wages	--	

3.8 Foster better global governance of fisheries

Poor governance, weak management and corruption leave fisheries open to IUU fishing and financial contributions open to misappropriation. This will limit the impact that FPAs can have on improving fisheries management and contributing to sustainable fisheries. Strengthening the management capacity of coastal states and fighting against corruption will be key in improving global governance of fisheries.

3.8.1 Strengthening the capacity of coastal states

Supporting the development and implementation of fisheries management framework and fisheries policy

The FPAs are established to develop a dialogue, between the EU and partner states, on fisheries management and policy. The intention is that the EU will support the development and implementation of fisheries policy through partnership actions, funded from the financial contribution of the FPA.

The 'dialogue' to be established between the EU and coastal states has caused concern with some partner countries. FPAs differ in their wording, with some agreements specifying that the parties shall 'initiate a policy dialogue on the necessary reforms...[and]... not to adopt measures in this area without first consulting each other' (e.g. Seychelles, Solomon Islands). The concerns of coastal states lies in the perception that this could infringe on their national sovereignty and right to establish their own national policies and priorities. However, in other FPAs, the wording does not require the EU to be consulted before the partner state makes changes to their policy, stating instead that they 'shall consult with a view to adopting potential measures in this area' (e.g. Madagascar, São Tomé & Príncipe). The experiences of coastal states regarding this should be evaluated after the FPAs have been in force for a few years.

Training and capacity building for coastal states

Training and capacity building may be funded through partnership actions financed from the FPA financial contribution, but will depend on the priorities selected. Whether FPAs can have a positive impact on the capacity of coastal states for fisheries management is discussed in Section 3.6. Targeted actions have had limited or unsustainable impact on fisheries management in some cases, and there is no guarantee that the financing for partnership actions under FPAs will be any different.

Sustainability of fisheries management measures

Fisheries agreements may not provide the right incentive to improve management and fisheries policy. They may in fact be a distraction to effective management, rather than an incentive, due to the steady stream of guaranteed income to the fisheries sector for several years, without the need to manage stocks for sustainable resource rents.

3.8.2 Fight against corruption

Poor governance and corruption are issues on which the FPAs themselves can have a limited impact. However, they are fundamental concerns, particularly since World Bank governance indicators have been shown to have a strong negative correlation with the amount of illegal fishing (MRAG, 2005). By supporting sustainable management, and through monitoring the outcome of the part of the financial contribution put towards the sectoral fisheries policy, FPAs may contribute to improving fisheries governance.

Transparency

Transparency of the FPAs, as with the FAs, is relatively greater than many fisheries agreements with other DWF nations. They are the only agreements where the details, including financial payments and the fishing opportunities are in the public domain. However, there are aspects of the negotiation process that could be made more transparent, such as making the ex-ante evaluations available in the public domain (Section 3.2.2).

Fight against illegal fishing

The fight against illegal, unreported and unregulated fishing (IUU) is key in improving global governance of fisheries. Its importance is reflected in its inclusion as a specific objective, 'contribute towards the elimination of IUU fishing' (Section 3.5). EU vessels have an interest in illegal fishing by other boats being reduced or eliminated, in order to safeguard stocks and the fishing opportunities. The FPAs have introduced a number of measures in this regard. However, there are still concerns about the compliance of EU vessels with regulations and the control measures by EU Member States (Section 3.5.3). There are potential problems that fighting illegal fishing may eclipse other issues in fisheries management that are equally, if not more important — fisheries management is not synonymous with combating illegal fishing and implementing MCS measures. It is important to set policy objectives, establish management plans and conduct research and data collection to monitor progress towards achieving those objectives. Combating illegal fishing will form one part of this overall process.

4 Case Study Analysis

Five case studies were selected to look in to some of the issues surrounding the FPAs in more detail. They represent a range of different scenarios and highlight a number of issues. The case studies cover a range of countries which have or which have had fishing agreements and/or fisheries partnership agreements with the EU and other countries. Non-EU agreements are also included as the sixth case study, in order to provide a point of reference with which to compare the EU FPAs. The case study countries and their respective fishing agreements are summarised in Table 4-1.

Table 4-1 Case Study Countries

	Fishing Agreement	Species covered	World Bank Income category	Gross National Income/capita (2005)
Mauritania	EU FPA Other fishing agreements	Mixed - cephalopods, hake, crustaceans, small pelagics	Low income	US\$ 560
Mozambique	EU FPA Other fishing agreements and joint ventures	Tuna (and previously, prawns)	Low income	US\$ 310
Senegal	Currently no agreement	Previously mixed	Low income	US\$ 710
Seychelles	EU FPA continued from existing fishing agreement.	Tuna	Middle income	US\$ 8,290
Solomon Islands	EU FPA	Tuna	Low income	US\$ 590
Non-EU agreements		Various	Various	

Source: World Bank (2007). World Development Report, EU DG Fish and MRAG reports

4.1 Mauritania

4.1.1 Overview

Mauritania is situated in north-west Africa and has had fisheries agreements with the EU since 1987. Poverty is high in Mauritania with 46% of the population living below the poverty line. GDP was 1.9 billion in 2005, but the economy is growing at a rate of 5.4%.

Mauritania signed a fisheries partnership agreement with the EU in 2006. The FPA covers mixed fisheries including cephalopods, black hake and small pelagic species. In financial terms it is the largest FPA signed with the EU by any ACP country to date, amounting to €86 million per year, with an estimated further contribution of €22 million in licences. This reflects the size of the EEZ and continental shelf (230,000km² and 36,000km² respectively), the productivity of the fisheries and the strategic importance of its relative proximity to Europe.

4.1.2 Importance of fisheries

The fisheries sector is important to the Mauritanian economy and accounts for 41% of export revenues. The Mauritanian Fish Trading Company (Société Mauritanienne de Commercialisation de Poissons) exported almost 40,000 tonnes of fish (octopus and

demersal fish) in 2004, of which octopus represented 51% of the tonnage and 82% of their annual turnover.

4.1.3 Types of fisheries

The overall fishing effort in Mauritanian waters for 2005 is summarised in Table 4-2. The types of fishing include:

- Demersal species (including hake and other trawled species)
- Crustacean (including shrimp and crawfish)
- Cephalopods (including octopus)
- Pelagic; and
- Tuna.

The octopus fishery is targeted both by artisanal fleets and by the national industrial fleet which uses around 125 boats of Chinese origin. It provides annual foreign currency turnover of € 70–80 million and 30,000 of the 35,000 jobs in the entire sector. However, it is also estimated that there is an excess of capacity of 31 % in the octopus fishery causing 20 % loss in production¹¹.

Table 4-2 Fishing effort in Mauritanian waters in 2005

Category	Type of Vessel	Overall effort	
		No. vessels	GT
Crustaceans	Freezer vessel	64	17124
	Wet-fish vessels	2	314
	<i>Subtotal</i>	66	17437
Black hake trawlers	Wet-fish vessels	23	6421
Demersal species (non hake or trawls)	Wet-fish vessels	23	3083
Demersal trawlers (excluding hake)	Freezer trawlers	9	2470
Cephalopod	Freezer vessel	150	50798
	Wet-fish vessels	88	20081
	<i>Subtotal</i>	238	70879
Crawfish	Freezer vessel	0	0
	Wet-fish vessels	0	0
Tuna seiners & pole and line	Freezer vessel	54	36029
Pelagic species	Freezer vessel	66	392,993
	Wet-fish vessels	0	0
Crab	Freezer vessel	4	839
Non-freezer small pelagic	Wet-fish vessels	0	0

4.1.4 Activities of distant water fleets

The EU fleets target a range of fish species in Mauritanian waters, including shrimp, demersal species, pelagic species and octopus:

- **Shrimp:** In 2004, the EU owned 37 out of 70 (53%) of the shrimp trawlers operating in Mauritanian waters;
- **Pelagic:** There are around 60 to 70 boats fishing for pelagic with Russian, Ukrainian and European flags. At present no Mauritanian boats are taking part in this fishery.

¹¹ Mauritanian Institute of Oceanographic Research and Fisheries (IMROP)

- **Octopus:** European cephalopod trawlers accounted for 33% of turnover achieved under all fishing agreements in 2004;
- **Tuna:** EU fleets dominate the purse seine tuna catch (Figure 4-1)

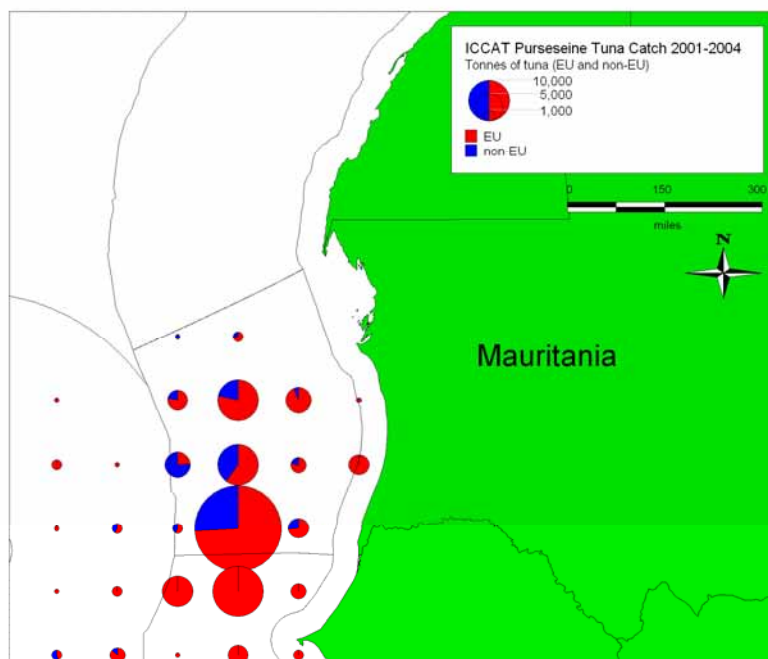


Figure 4-1 Mauritania ICCAT Purse seine total Tuna Catch 2001-2004

4.1.5 History of fishing agreements

Financial contribution

The EU has had a fishing agreement with Mauritania since 1987 and has continued to renew this agreement and related protocols up to the present day. The Fisheries Partnership Agreement (FPA) was approved for the period 2006–2012 and includes a protocol valid from 2006–2008. It is the most expensive fishing agreement to the EU at € 86 million per year. Table 4-3 illustrates the financial contribution and fishing possibilities agreed since 1996.

The FPA provides € 11 million to help implement the national fisheries policy, including € 1 million for the Banc d'Arguin national park, and requires the Joint Committee to develop objectives and performance indicators to measure progress. The proposed regulation for Mauritania's FPA includes guidelines for this process and highlights three main priorities:

- 1) Improving governance within the sector (through improved research, information and controlled development of the small-scale sector);
- 2) accelerating the integration of the fisheries sector within the economy (through development of infrastructure, the local fleet, improved surveillance and improved marketing); and
- 3) improved capacity through the effectiveness of technical services and management systems for licences.

Table 4-3 Financial contribution and fishing possibilities for the past three EU fishing agreements with Mauritania

	Protocol	2006-2008	2001 to 2006	1996 to 2001
Financial Compensation / Contribution	Financial contribution (€ millions)	172.00	430.00	266.80
	No. years	Protocol: 2 years Agreement: 6 years	5	5
	Financial contribution/year (€ millions)	86.00	86.00	53.36
	Targeted per year* (€ million)	11.00	4.0	1.05
	% Targeted	13.0%	4.7%	2.0%
Fishing Possibilities	1. Crustaceans¹ (GRT/y)	9,440 GT	6000	5500
	2. Black hake trawlers and bottomliners³ (GRT/y)	3,600 GT	8500	8500
	3. Demersals³ (GRT/y)	2,324 GT	3300	4200
	4. Demersal trawlers⁴ (GRT/y)	750 GT	4000	5500
	5. Cephalopods (GRT/y)⁵	18,600 GT	16500	10440
	<i>Cephalopods (vessels/y)⁵</i>	43	55	42
	6. Lobster (GRT/y)	300 GT	200	300
	7. Freezer tuna seiners (vessels)	36	36	40
	8. Pole-and-line and surface longliners (vessels/y)	31	31	17
	9. Pelagic freezer trawlers (vessels/y)⁶	22	15	22
	10. Crab	300 GT	-	-
	11. Non-Freezer Pelagic vessels	150,00 GT per month	-	-

* Targeted actions or support for developing and implementing a sectoral fisheries policy

Utilisation rates

Utilisation rates of the fishing possibilities have been high for most species, apart from the demersal species categories and lobster possibilities (Table 4-4).

Table 4-4 Utilisation rates of previous Mauritanian agreements

Categories	2001–2006	1996–2001
Crustaceans	Almost 100%	Almost 100%
Cephalopods	Almost 100%	Almost 100%
Tuna vessels	Satisfactory	85% pole & line 74% seiners
Demersal species categories	Low	51% black hake trawlers & bottom longliners
Lobster	Not stated	4%
General Comments	185 Community vessels used the agreement (130 in demersal fishing categories)	

4.1.6 Negotiations

The most recent negotiations with the EU for the 2006–2012 FPA were considered by Mauritania to be much more transparent and effective than for previous fisheries agreements. Rather than the negotiations just involving the Finance Minister, two rounds of the negotiation took place in Mauritania and enabled the involvement of a range of fisheries specialists including: Minister of Fisheries; the Institute for Oceanographic Research (IMROP); the Delegation for the surveillance of the sea (DSFCM) and the National Federation of Fishing (FNP). It was also the first time that the negotiations were covered by the media, which required the procedures to be more transparent, and for the

ex-ante evaluation to be shared with the government. The government also started with a stronger negotiating position by developing the annual budget without integrating a possible financial contribution paid by the EU for fisheries access.

4.1.7 Dependence of the national budget on the EU agreement

Despite this stronger negotiating position, there is general acceptance that Mauritania is highly reliant on the financial contribution offered under the FPA. In 1999, the fisheries sector provided at least 20% of the budgetary receipts. Breakdown of the expenditure from the 2001–2006 agreement is shown below and shows that which 4.6% was reinvested in the fisheries sector (as determined in the agreement); the rest was used in public funds.

Table 4-5 Recorded spend of the financial compensation paid by the EU to Mauritania

Beneficiaries	Amount (€)
Public Treasury	82,000,000 (95.6%)
Research and sanitary control	800,000
Marine Surveillance	1,500,000
Training	300,000
Artisanal fisheries	800,000
Institutional support	400,000
Others	200,000
Total	86,000,000

Source: IMROP, 2002

4.1.8 Coherence issues

Over-exploitation of certain species

A number of the country's high value stocks are considered to be over-exploited, and it is likely that along with the activities of other fleets the EU DWF has contributed to the decline. This includes octopus, lobster, shrimp and demersal species such as hake and soles. CNROP-FAO recommended in 1999 that effort for octopus should be reduced by 25% and that demersal species (notably *thiof*) had halved in 15 years. There are also concerns with the levels of by-catch. Trawling for octopus also results in around 60% by-catch, and that for shrimp is in the region of 85% although the Mauritanian law allows a maximum of 35% for the latter¹².

The FPA made some allowances for these constraints; there was a 60% decrease in access for demersal species (based on previously low utilisation rates) and a reduction in the number of licences allowed for cephalopod fishing from 55 to 43 (30% reduction), although five of the 55 licences had already been temporarily suspended in 2005 due to concerns about over-exploitation of the stock.

Although the FPA accounts for the closed season for octopus in September and October, it does not account for the closed season in May which is part of the Mauritanian fisheries law. However, implementation of the closed season for shrimp and octopus was requested under the Joint Committee and has been enforced¹³. The minimum mesh size of 70mm for octopus may not be coherent with the CECAF regulation adopted by the EU in 2006, which suggests that the minimum weight must be 450g (gutted). However, a study conducted in 2002 by the Portuguese Research Institute (IPIMAR) showed that a mesh size of 70mm equates to a catch weight of 370g, lower than the 450g gutted weight proposed by the new EU regulation (CFFA & Pechecops, 2006).

¹² CFFA & Pechecops (2006) Mauritania EU Fisheries Partnership Agreement: What impacts on fisheries sustainable development in Mauritania?

¹³ Interview with DG Fisheries, May 2007.

Overlap between the national fisheries sector and the EU fleet

The current fisheries policy (Strategy for the Sustainable Development of the Fisheries Sector and Maritime Economy, 2006-2008) favours the development of a national fisheries sector. This is also backed the objectives in Mauritanian Poverty Reduction Strategy Paper (PRSP) where the fisheries sector is considered a priority within the pillar to promote accelerated growth within the national economy. There are particular targets to strengthen the integration of the sector into the economy and to encourage local processing. The fisheries policy hopes to achieve this by encouraging development of the industrial fleet and then to freeze effort to support the development of artisanal fisheries. The artisanal fishery is considered an important part of the strategy to reduce poverty, support local development and sustain national food security. It currently employs 30,000 out of the 35,000 jobs in the fisheries sector.

Despite these plans to develop the national fisheries sector, currently 70% of the total quantity of fish caught in Mauritanian waters is caught by foreign fleets. The national industrial fleet is made up of around 125 ex-Chinese boats and finds it difficult to compete against the foreign vessels, such as the EU vessels which have much more sophisticated equipment and significant structural support (e.g. through the Financial Instrument for Fisheries Guidance and now the European Fisheries Fund). EU fleets are also in direct competition with local fisheries targeting octopus. 75% of the total value of exports (\$185 million in 2005) is represented by octopus, mainly to support the demand from Japanese markets. Local fishers have reported on average a 40% decrease in their catches since the 1990s.

A significant change in the FPA is the inclusion of non-freezer pelagic trawlers. This has a potential benefit for the local processing sector as these ships are more likely to land locally, but there is also a potential conflict with local small-scale and industrial fisheries that also target pelagic resources through increased competition (although the EU fleet is restricted to waters further than 12nm from the coast). The requirement for local landings has in fact been removed from the most recent protocol, although the financial incentives remain. While the FPA introduces a category for non-freezer pelagic vessels increasing the likelihood that vessels may land locally there are no other specific measures to support the local processing industry.

Limited value added

Although fisheries is the most important primary production sector in the economy, it currently only contributes 2.8% to the national GDP. While the retail value of fish caught in Mauritanian waters is estimated at more than US\$ 450 million per year, the sector only yields US\$ 94 million in local value added (20%). Only 10% of fish landings in Mauritania are processed¹⁴, and there are almost no landings made by the EU fleet, despite the financial incentives. The majority of the resources caught at sea are exported directly to principle markets in Europe, Japan and other Asian countries. EU vessels land primarily within their own countries, and the investment conditions have not been right to encourage investors to localise their factories within Mauritania or to establish joint enterprises.

Mauritania has a history of fish processing plants established in Nouadhibou and Nouakchott, many of which have gone bankrupt. There has been a lack of proper business planning and investment evaluation and in some cases investment in the sector has been purely speculative, and seen as a method of obtaining foreign exchange. The processing plants that do exist complain of excessive taxation, corruption by some government

¹⁴ Processing is often limited to low value added activities including freezing and export of high value fresh fish by aircraft and road transport to Senegal and Europe. There are some higher value activities such as filleting and individual packaging of species such as dorade for European restaurant markets. There is some smoking and drying of certain species for export to regional African markets

officials, excessively high production costs (fuel, electricity and other inputs) as well as irregular supplies of fish, poor physical infrastructure, including the lack of regular water supplies and irregular electricity supplies. In addition, although there is a new investment code in Mauritania, this is not considered to offer the legal conditions and financial security which foreign investors seek. In addition, the local banking system is poorly developed, and offers mainly short term credit to operators who control these banks.

The FPA potentially encourages conditions that may lead to more landings of pelagic species, but there is a lack of clarity on whether this will happen in practice. Approximately 400,000 tonnes of pelagics are caught annually in Mauritanian waters by foreign freezer trawlers and mainly transhipped at sea or from Las Palmas (Spain). There has been some interest expressed by the Spanish to invest in the development of a pelagic port in Nouadhibou, although there remains the issue of the well established pelagic handling and processing facilities (Spanish and Dutch capital amongst others), which exist in Las Palmas, Puerto de la Luz, and which in some cases may have received support under Objective 1 region financing by the EU.

Food security

Although fish supply per capita has not necessarily decreased, there has been a change in quality of fish available on local markets. Previously large demersal species, the local market is now dominated by inferior quality pelagic species. However, it is not only fishing agreements that have contributed to this, but also the increase of fisheries exports and possibly increased exploitation by local and Senegalese motorised artisanal fishing fleets.

EU development policies

Unlike many of the other agreements, the FPA with Mauritania outlines (within the protocol) the specific objectives of the national fisheries policy. In some of the other agreements these objectives are kept very vague. However, there is currently no development support from the EU specifically for the fisheries sector in Mauritania (within the 9th EDF), although among other donors, Germany is providing support for an MCS system and fisheries resource management and the World Bank is considering an investment programme in fisheries and associated infrastructure. In addition French and Spanish aid support developments in the artisanal fishing sector. The EU Regional Indicative Programme for West Africa also provides € 6 million for MCS activities and statistics collection. It should be noted that EU STABEX funding will be used to finance the removal of wrecks from Nouadhibou harbour which at the moment act as a constraint on port activities.

4.2 Senegal

4.2.1 Overview

Senegal has a long history of fishing agreements with the EU and a number of other countries. These fishing agreements have been for the exploitation of mixed species – cephalopods and other demersal species, small pelagics, tuna and crustaceans. Currently Senegal does not have a fisheries protocol in force with the EU, but the overarching Agreement is still in place. The previous protocol expired on 30 June 2006, and negotiations for an FPA were unsuccessful. In the absence of an agreement with the EU, there has been conclusion of a private fishing agreement for a number of EU tuna fishing vessels.

Although there is still widespread poverty in Senegal (58% of households were classed as poor in a 2001 QUID survey), the economy has been growing at a rate of 6% and has benefited from investment and growth in the services sector since the outbreak of civil war in Cote d'Ivoire. GDP was 8.3 billion in 2005. Senegal's natural resources are relatively limited, with the exception of fisheries, phosphate and oils, and the economy relies on the tertiary sector which contributes 60% to the economy. While agriculture (including agriculture, livestock and fisheries) only contributes 20% to the economy it employs around 54% of the national population.

4.2.2 Fisheries and fleet activities

Importance of the fishery sector

The fisheries sector is important for the economy of Senegal for the value added (estimated as €310million), contribution to the state budget (1.8% in 2003), employment (100,000 in fishing activities, and 600,000 in related industries); and contribution to exports. Fisheries earnings from exports amounted to \$314million in 1999 outpacing groundnut and phosphate sectors, and accounted for 25% of exports in 2003.

Exports

Senegal exports around 28% of the annual fish production, estimated as 405,560 tonnes in 2001¹⁵. In 1999, 60% of fisheries exports from Senegal were destined for Europe¹⁶, but only accounted for 2% of Europe's total fisheries imports¹⁷. Since 2002, the US has agreed to lower tariffs from some African countries and the Asian markets is also increasing in importance with 13,000 tonnes of octopus (from artisanal catches) exported to Japan in 1999. Also in 1999, 37,000 tonnes were exported to other African destinations and there are signs that this could be higher if infrastructure and institutional constraints were overcome¹⁸.

Types of fisheries

Senegal's EEZ covers 147,221 sq. km with a coastline on the Atlantic Ocean of 718 km. There are a number of important fisheries within Senegalese waters:

- Coastal demersal species (including fish and cephalopods) targeted by artisanal, national industrial and distant water fleets;
- Ocean demersal species including shrimp targeted by national industrial and distant water fleet trawlers;

¹⁵ FAO (2007) Senegal Fisheries Country Profile (FAO website)

¹⁶ UNEP (2002) Integrated Assessment of Trade Liberalisation and Trade-Related Policies

¹⁷ Gueye, N (2003) The Senegalese experience in negotiations of fishing agreements with the European Union and the Impact of the Senegalese populations. International Seminar (CTA/CW) on ACP/EU Fisheries Relations: Towards Mutual Benefits' 7-9th April 2003, Brussels, Belgium.

¹⁸ UNEP (2002) Integrated Assessment of Trade Liberalisation and Trade-Related Policies

- Pelagic sardine fishery targeted by national semi-industrial and distant water fleets; and
- Tuna fishery targeted mainly by distant water fleets, but also a small number of national industrial vessels.

In terms of the national fleet, the artisanal sector is the largest, followed by national industrial trawlers and then tuna seiners and pelagic vessels. The estimated national fisheries capacity for 2004 in Senegal is summarised in Table 4-6. In artisanal fishing, 80% of catches are pelagic and mostly for national consumption.

Table 4-6 Summary of the national fisheries capacity in Senegal (2004)

Artisanal Fleets		Semi-industrial pelagic fleet	Industrial fleet	
No. canoes	No. fishers	No. boats	No. trawlers	No. tuna seiners
9,508	57,321	3	124	5

Activities of Distant water fleets

During the last fisheries agreement (2001-2006) European vessels were an important component of the distant water fleets operating in Senegalese waters (Table 4-7). Total catch for the EU vessels was recorded as 10,839 tonnes in 2003 and 9,828 tonnes in 2004.

Table 4-7 Distant water fleet activity (2001-2003)

	2001		2002		2003	
	Trawlers	Tuna vessels	Trawlers	Tuna vessels	Trawlers	Tuna vessels
Spain	34	18	40	27	24	20
France	0	0	0	22	0	10
Greece	3	0	0	0	0	0
Portugal	1	0	2	0	1	0
Italy	2	0	3	0	3	0
Japan	0	1	0	2	0	0
St Vincent	0	0	1	0	0	1
Antilles	0	0	0	2	0	2
Venezuela	0	0	0	1	0	1
Gabon	0	0	1	0	1	0
Cap-Verde	1	0	0	0	0	2
Mauritania	0	0	3	0	0	0
Total	41	19	50	54	29	36

Note: European countries in bold

Source: DPM (Senegal Fisheries Department)

EU vessels have therefore historically made up the greatest proportion of distant water fleet activity (Figure 4-2) and have also been responsible for the greatest proportion of tuna catch from purse seiners (Figure 4-3). Since 1991, Senegal had an agreement with Japan for 40 long-liners, but only 2-3 vessels took up the opportunities, and since 2003 there have been no active Japanese vessels in the EEZ.

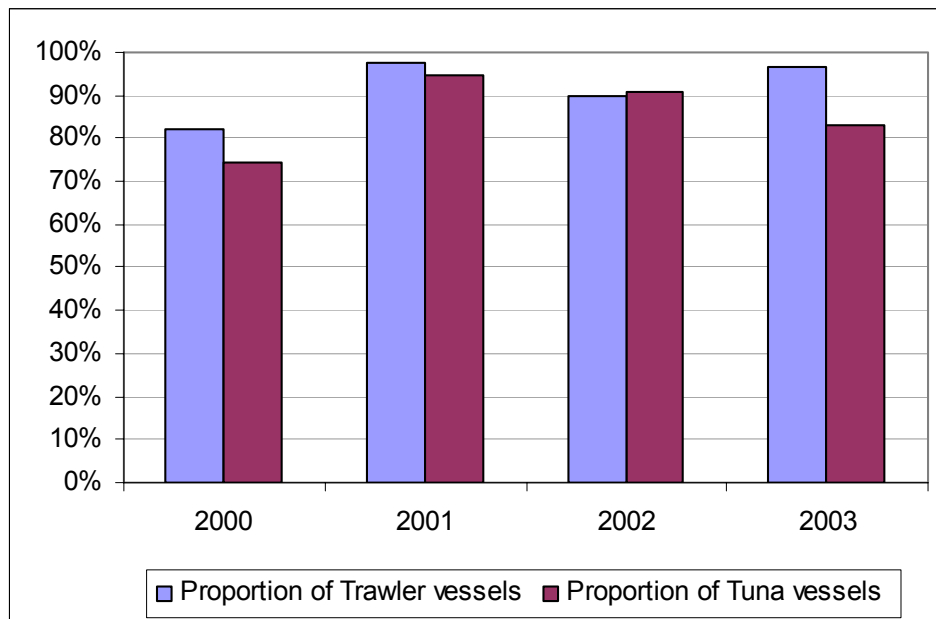


Figure 4-2 Percentage of EU vessels as a proportion of total vessels

Note: does not include Senegalese vessels

Source: DPM (Senegal Fisheries Department)

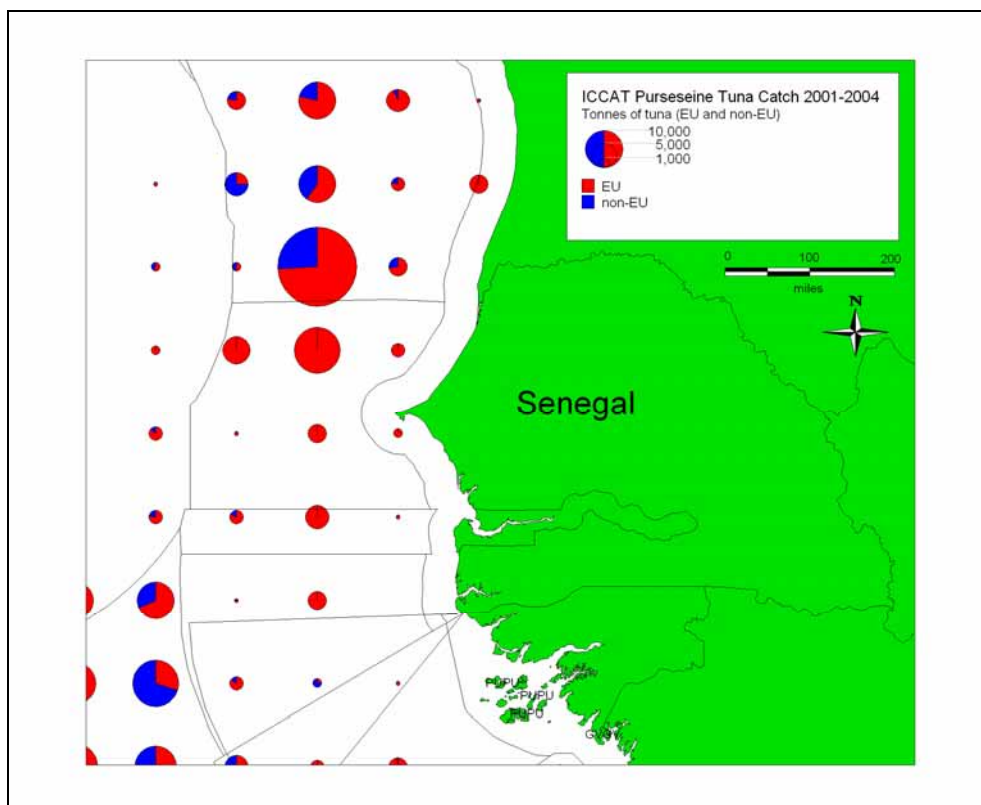


Figure 4-3 Senegal ICCAT purse seine total tuna catch 2001-2004

Source: ICCAT data

4.2.3 Fishing agreements with the EU

History of Agreements

Senegal has had fishing agreements with the EU since a two-year agreement signed in 1979. This was in effect a revision of agreements held separately with France and Italy.

Agreements remained in a similar format until 1988 when following adoption of a national law on a Maritime Fishing Code¹⁹, differential licences were introduced for trawlers depending on the target species and conservation measures such as fishing zones and biological rest periods were introduced. A number of these aspects are reflected in the fishing agreements illustrating how national legislation can drive improvements in the technical measures of the agreements. However there are some aspects that are not observed by the fishing sector, notably gear and equipment restrictions (e.g. types of nets and mesh size); and the requirement to develop a fisheries management plan for over-exploited coastal demersal species.

Financial contribution

Table 4-8 illustrates how the financial contribution paid by the EU changed over time during the fishing agreements, and the corresponding fishing opportunities. There was a gradual change over the years towards compulsory landings and reducing opportunities for non-landed inshore demersal fish. This corresponds with the competition with local fleets over these inshore demersal resources.

Table 4-8 Financial contribution and fishing possibilities

Year		1990-1992	1992-1994	1994-1996	1997-2001	2001-2006*
Total contribution €million/year		14.4	15.6	7.9	12	16
Fishing possibilities	Inshore demersal fishing fish & cephalopods (Landing)	1 000 GRT/year	1 000 GRT/year	-	-	1500 GRT
	Inshore demersal fishing fish & cephalopods (not landing)	2 200 GRT/year	1 250 GRT/year	500 GRT	481 (3 vessels)	-
	Deep sea (non-freezer) demersal fish trawlers (not landing)	5 000 GRT/year in an average year	12 000 GRT/year	4 000 GRT/ 4 month period	3750GRT (11 vessels)	3000GRT
	Freezer trawlers (inshore demersal fishing) fish & cephalopods: (landing)	2 800 GRT/year;	6 500 GRT/year ;	1 000 GRT/year	1800 (7 vessels)	-
	Freezer trawlers (inshore demersal fishing) fish & cephalopods (landing) – 4 month period	1 000 GRT/year in an average year;	1 000 GRT/year	2 000 GRT/month period	-	-
	Ocean-going shrimp freezer trawlers (demersal) (not landing)	18 600 GRT/year;	6 100 GRT/year	5 000 GRT/year	4119GRT (22 vessels)	3500GRT
	Tuna vessels landing catch	20	11	11 Pole & Line	12 Pole & Line	16 Pole & Line
	Freezer tuna seiners (landing part)	48	57	47	41	39
	Surface long-liners	35	11	6	23	23
	Experimental bottom long-line	-	1 500 GRT/year	-	-	-

During the 2001-2006 agreement €16 million was allocated to the fisheries sector. Over a third of this was allocated to fisheries quay development (39%), with 12% allocated to a revolving fund and 10% allocated each to training for the marine and fresh water directorates and support to the study and planning unit. Only 9% was allocated to fisheries research through the Centre for Oceanographic Research at Dakar Thiaroye – CRODT, which provides a review on the state of the stocks. The remainder was allocated to the

¹⁹ Code de la Pêche Maritime. Decree No : 98/948 of June 1998

support unit for sustainable development of fisheries, funded to purchase tuna supplies for the factories; cost store development, marketing development and financing for a Master Plan for marine fisheries.

Costs and Benefits of the agreement

The 2001-2006 agreement provided economic benefits to Senegal, including employment of around 410 Senegalese seamen and 82 observers on distant water fleets.

There are some additional economic data for the 1997-2001 agreement which provides indications of the annual economic benefits (see Table). This suggests that there were state benefits of €18.4 million per year and revenue to the private sector of €2.7 million per year.

The Directorate of Fisheries estimates total EU catch tonnages to be 10,839 tonnes in 2003 and 9,828 tonnes in 2004. ICCAT report EU tuna catches from purse seiners in Senegal's EEZ as 1,661 tonnes in 2003 and 2,496 tonnes in 2004. The value of tuna is between €500-1000/tonne and that of trawler species can be between €5,000-10,000 per tonne. This suggests a conservative estimate of gross revenues (without taking into account operating costs) in the region of €35-45 million. However these figures need to be assessed within a rigorous cost benefit analysis.

Table 4-9 Estimated benefits to the coastal state

	Total value (1997-2001)	Annual
Financial contribution	€64,000,000	€16,000,000
Licence fees	€4,300,000	€1,075,000
Tax Revenue	€457,347	€1174,336
Port fees	€762,245	€190,561
Expenditure on food, salt, ice and accommodation	€2,100,000	€525,000
Expenditure on transport	€3,000,000	€750,000
Ship and equipment repairs	€6,000,000	€1,500,000
Total State benefits	€69.5 million	€18.4 million
Total Private benefits	€11.1 million	€2.7 million

4.2.4 Negotiations

The previous protocol expired on 30 June 2006, and negotiations for an FPA have been unsuccessful. The main priorities for Senegal in the negotiations included:

- protection of coastal demersal resources: no access for EU fleet;
- reduction of GRT of EU vessels;
- increase in local landings, local processing and added value;
- requirement for Senegalese observers on board (not ACP hired).
- increase in financial contribution:

There have been indications from previous negotiations that Senegal favoured a financial contribution based on the development needs of the fisheries sector, rather than corresponding to the level of fishing possibilities. Other areas of disagreement included differences on the definition of fishing zones and biological rest periods and the restrictions on by-catches²⁰.

²⁰ Gueye, N (2003) The Senegalese experience in negotiations of fishing agreements with the European Union and the Impact of the Senegalese populations. International Seminar (CTA/CW) on ACP/EU Fisheries Relations: Towards Mutual Benefits' 7-9th April 2003, Brussels, Belgium.

These issues became problematic and it was not possible to reach agreement between the two parties. It may also have been that the FPA with Senegal was less of a priority for the EU, since a new agreement with Morocco had just been reached (for the period 2006-2010)²¹.

In terms of transparency, case study interviewees from the fisheries authority reported that they had not been aware that the ex-post and ex-ante evaluations had been shared with Senegal during the negotiations for an FPA, although the European Commission did send the evaluation to Senegal. It is also considered that the Senegalese negotiators would have benefited from capacity building before entering into discussions with the EU.

4.2.5 Current EU Private Licences

Since no agreement has been signed with the EU since 2006, the EU tuna and trawl vessels are currently operating under private licences (initially agreed for a 6 month period). There are currently 11 EU boats operating under this arrangement (7 Spanish and 4 French), although 9 of these are currently active. Payments for licences were €53/GRT/year with an obligation to land all their capture in Senegal to supply the processing sector.

4.2.6 Coherence of Development policies and the FPA

Fisheries are included as a priority sector within the Poverty Reduction Strategy Plan for Senegal (2002). The objectives within the fisheries sector are to ensure sustainable management; meet domestic demand for fish consumption (food security); enhance added value of fisheries products; enhance qualifications of those in the sector; and strive for sustainable financial management.

Fisheries is not included as a priority sector within the EU National Indicative Plan (NIP) (2002-2007), although reference is made to the targeted actions provided for in the EU fisheries agreement (2002-2006) to support sustainable fisheries. The other mention of fisheries in the NIP is the support for good governance in order to create an enabling environment for private sector investment to increase technical and operational capacity in the fisheries sector. In the EU's previous NIP (8th EDF), there has been a €5 million programme to support the artisanal fisheries sector.

Specific support for the fisheries sector is provided within the EU's Regional Indicative Plan for West Africa, although the amounts are relatively small with €6 million allocated for MCS regional activities. There are also mention of other potential programmes including support for the development of a regional fisheries policy and an evaluation of the capacity requirements to implement such as policy.

The priorities of Senegal's PRSP (for the fisheries sector) are discussed below in relation to the coherence with the FPA.

Sustainable management of fisheries

EU fisheries agreements with Senegal have coincided with the development of small-scale fishing. National fleets are able to exploit coastal, demersal and pelagic resources and have therefore been in direct competition with distant water fleets for coastal demersal, crustacean, cephalopod and pelagic resources.

The Senegal-EU agreements from 1990 to 2006 routinely gave fishing possibilities for inshore demersal fishing and cephalopods despite the possibility that these were not in

²¹ The Senegalese 2001-2006 had been particularly important given the non-renewal of the Moroccan agreement when negotiations failed in 2001.

fact 'surplus stocks'. The possibilities were decreased however, successively in 1994, 1997 and 2001 illustrating the competition between the national and distant water fleets, and concerns on the state of the stock. A number of actors in the fisheries sector consider the distant water fleets as a factor in the over-exploitation of these resources.

There have also been concerns that fishing possibilities were not based on rigorous stock assessments. Assessments by CRODT have not always permitted an accurate evaluation of the available resources and the level of fishing pressure that can be sustained, and where these have been available the scientific recommendations have not always been followed²². Research by CRODT in 1995 suggested that coastal demersal stocks were fully exploited, but fishing possibilities were consistently included in EU agreements.

Some individual EU states have given support to artisanal fisheries that may be in direct competition with the EU DWF. For example, Spain has given support for refrigerating factories and France created a port for artisanal fisheries and a programme of support for 'sustainable management of fisheries'. One of the difficulties in negotiating a new agreement between the EU and Senegal was, although both parties were in agreement that there should not be any fishing possibilities for coastal demersal resources, Senegal did not want to see a reduction in the financial contribution associated with the agreement.

Domestic demand: Food security

Fish is important for local food security in Senegal. Malnutrition remains a problem with 20% of children being underweight. Fish is still the most accessible protein in terms of price, quantity and quality and on average provides 75% of local protein needs (consumption of fish is higher in Dakar and coastal areas (43 kg/yr) than other areas of the country (26 kg/yr).

There has been a dramatic increase in exports of fish products from Senegal, sparking off concerns related to food security. A 2002 UNEP study reported annual price increases of 7.5% for small pelagic species and 15-20% for demersal species with low local market fish supplies. Some observers have criticised foreign fleets for leading to over-exploitation of these resources leading to a reduction in local supply and price increases on the domestic market. While competition with distant water fleets has been a factor in driving up prices, other factors include the increased in the exports of fisheries products. This has been encouraged by structural adjustment policies and export subsidies up to 25%; and devaluation of the CFA by 50% in 1994 (increasing operating costs for small-scale fishers). Preferential tariffs under the Lomé and now the Cotonou agreements between the EU and ACP countries have also encouraged exports to the EU²³.

The other concern for food security related to fishing agreements is the impacts of by-catch associated with the distant water fleets. These often consist of juveniles that are important both for the local biodiversity, but are also a loss of valuable food products.

Value added of fisheries

The processing sector is relatively important with two operating canning factories, employing around 1,500 people. Within the last agreement Senegal secured approximately 17,000 tonnes of local tuna landings per year, as well as demersal catches (250kg/GRT/quarter for inshore trawlers and 150kg/GRT/quarter for deep-water trawlers). During the last agreement, local landings from European Vessels accounted for 50% of the capacity of the local tuna processing industry. The artisanal sector also contributes

²² Dahou, K & Deme, M Accords de pêche UE-Sénégal et commerce international : Respect des réglementations internationales, gestion durable des ressources et sécurité alimentaires. Enda : Tiers Monde. Centre Recherches Océanographiques de Daka-Thiaroye (CRODT)

²³ UNEP (2002) Integrated Assessment of Trade Liberalisation and Trade-Related Policies

significantly to the processing sector. However, the processing sector is still relatively undeveloped with exports made up of 15% processed products and 85% fresh or frozen products.

The issue of local landings proved problematic during the negotiations for a new FPA and was one of the points where no agreement could be reached. The new private tuna agreements require all the catch must be landed in Senegal, illustrating the high importance of the processing sector to the local economy. However, even with local landings there are also concerns that

There have also been objectives over the years for the EU effort in the tuna sector to be progressively displaced by national vessels. However, this has not materialised over the period of the agreements and the national fleet remains small.

Qualifications within the sector

Senegal is obviously concerned with the capabilities of their national fleet. This was also apparent in the negotiations of the FPA where Senegalese negotiators were keen to keep the requirement for employment of Senegalese crew, rather than a more general requirement for ACP crew. It obviously gives the EU fleets more flexibility to recruit from any of the ACP countries, but would have been in-coherent with this objective in Senegal's PRSP.

4.3 Seychelles

4.3.1 Overview

Seychelles is a small island state located in the Western Indian Ocean. It has recently signed an FPA with the EU and the current protocol, negotiated under the previous fisheries agreement, has been transferred to the FPA. This is a single species agreement for tuna, but it is one of the most valuable tuna agreements totalling € 4.125 million a year for a reference annual tonnage of 55,000 tonnes. The protocol was revised in early 2007, increasing the financial contribution to € 5,355,000 per year.

The fisheries sector is the most important in terms of traded goods, accounting for 97 % of visible exports, and is an important source of foreign exchange for the economy. It is the second largest contributor to the Seychelles economy after tourism.

4.3.2 Activities of the EU Fleet

The majority of the EU vessels operating in the Seychelles EEZ are purse seiners, and account for the majority of the purse seine catch in terms of tonnes. Port Victoria, the capital, is an important base for the EU purse seine vessels.

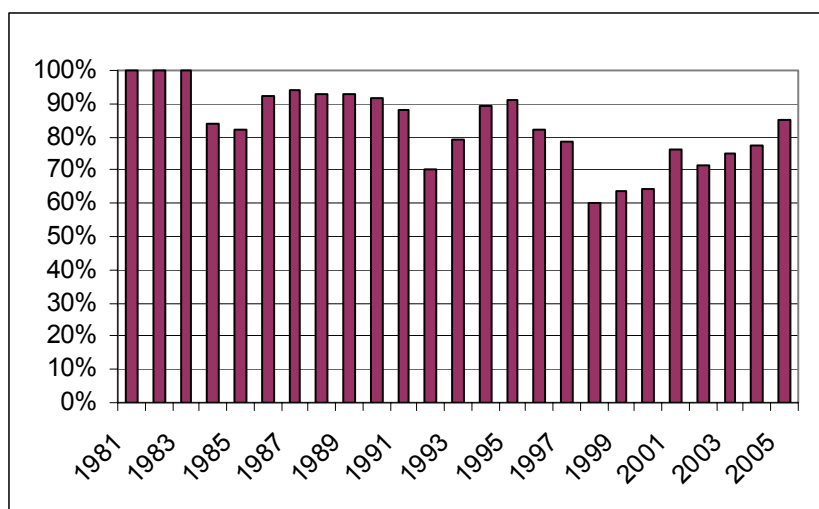


Figure 4-4 Proportion of EU catches of total purse seine catch in the Seychelles EEZ

Seychelles also has fishing agreements with Japan, Taiwan, South Korea and more recently with China. The Asian fleets dominate the long-line fishery and have a much lower production, but of higher value fish. The total number of licences issued to foreign long-liners was 334 in 224 (191 for Taiwan, 110 to Japan and 29 to South Korean Vessels). These vessels also catch large quantities of swordfish.

4.3.3 Negotiations

In general Seychelles feel they are in a relatively strong negotiating position as they have good information on the actual catches of the EU fleets. This is partly due to the information available from the Indian Ocean Tuna Commission (based in Seychelles) and because the EU fleets land most of their catch in their ports. They have also had years of experience in the negotiations and receive a relatively high contribution amount, even though utilisation of the reference tonnage is rarely 100 %. However, Seychelles did not receive the ex-ante evaluation report until after the negotiations had been completed.

4.3.4 Strong fisheries export and processing sector

A large quantity of tuna caught in the Western Indian Ocean is transhipped or landed within the Seychelles and supplies a strong processing sector, for both canned and frozen tuna. EU vessels land the majority of their catches here (92 % for Spanish and 82 % French). The output from the Indian Ocean Tuna Ltd canning factory is currently around 55,000 tonnes per year, with some tuna loins prepared in addition for European canneries in France. It supplies 18 % of the entire EU market.

There is also a small local fish processing sector which produces further loins for the European canners, helping them to maintain competitiveness (as this represents the labour-intensive part of tuna canning). The tuna cannery industry provides significant employment opportunities for around 2,500 people. In total 9,000 people are involved in the fisheries sector representing 10 % of the Seychellois population.

The port industry contributes to the economy in diverse ways and vessel expenditure is estimated at over € 57 million per year. However, 64 % of goods and services purchased by tuna fleets in port went on fuel which is imported, generating relatively little local benefit.

Total exports worth € 101,000 million in 2004 were made up of 53 % canned tuna and 42 % frozen tuna. Almost all exports are destined for the EU. In 2000 the share was UK 48 %, Italy 23 %; France 14 % and Netherlands 3 %, illustrating the dependence Seychelles has on both the foreign fleets supplying tuna, and on the favourable tariffs for ACP countries supplying the EU market (0 %). However it can also benefit from preferential trade agreements with the US, and the EU with the Everything but Arms initiative with the Least Developed Countries.

4.3.5 Competition of the processing sector in the face of trade liberalisation

Analysis looking at the impacts of trade liberalisation (in the loss of trade preferences for ACP countries) has illustrated that the Seychelles tuna processing sector would start to become uncompetitive if the tariffs for other countries — outside the ACP — were reduced to 10 % [MRAG, 2007]. These impacts may also affect Mauritian and Madagascan canneries which create a regional demand for tuna transhipped in Seychelles ports. Heinz has recently sold Indian Ocean Tuna Ltd, which may be related to expectations of changes in the trade arrangements. There is considerable concern by the main processing plant in the Seychelles regarding current and potential competition from Asia tuna canning operations.

4.3.6 Local fishing capacity

The Seychelles has low capacity within its own national fishing sector, with only two semi-industrial vessels which are registered in Seychelles. There are hopes that the current FPA will encourage further joint ventures, but there were no such developments in the first year (2006) and there are concerns that the correct incentives for investment do not exist.

The Seychelles has a well-developed fisheries policy (Fisheries Development Plan, 2001) and fisheries legislation. The long-term policy objectives of the Government of Seychelles for the fishing industry are 'the promotion of sustainable fisheries development and optimizing the benefits from the fisheries sector for the present and future generations'. In particular, promoting sustainable management to ensure the long-term viability of the industry, and maximising employment, revenue from fisheries and foreign exchange earnings. The money from FPAs to develop and implement a sectoral fisheries policy should be used towards these ends. When defining the objectives for the multiannual plans for the activities to be funded with the FPA funds, the EU was keen for most of the money to be spent on MCS activities, to tackle illegal fishing. This is important for Seychelles, but will also be beneficial for the EU fleet, by reducing competition from illegal

vessels in the fishery. However, Seychelles has other important policy objectives for its fisheries in addition to curbing illegal fishing, such as developing national fishing capacity as a means of increasing employment opportunities and optimising the benefits from fisheries, as well as supporting artisanal fishers. If the EC does not agree for the funds from FPAs to be used towards developing national fisheries capacity, there will be a lack of coherence between FPAs, EU Development policies and national development priorities.

4.3.7 Coherence of EU Development policies and the FPA

There is no specific support from the EU's 9th EDF support programme for the Seychelles, although it does mention the 2002-2005 Fisheries Agreement. It suggests that the FA provides development aid for the fisheries sector, but provides no additional support for this. It also suggests that the FA should pay attention to the sustainability of yellowfin tuna and encourage the development of national fishing capacity.

There is support for fisheries within the EU's Regional Indicative Plan (RIP) for Eastern and Southern Africa including support for MCS of pelagic species, resource assessments for tuna and sustainable management of coastal and regional fisheries.

4.4 Solomon Islands

4.4.1 Overview

The Solomon Islands is a group of islands located in the Western Pacific Ocean. The length of the coastline is 4,270 km and the area of the EEZ is 1.63 million square km. The total population is estimated at around 480,000 with a per capita gross national income of US\$ 590 (World Bank, 2007). The economy is based on subsistence farming while the main cash crops are coconuts and cocoa. Timber extraction is significant while the tuna fisheries are one of the main sources of export income. In addition there are some mineral resources, notably gold and phosphate deposits.

Solomon Islands signed an FPA with the EU for a 6-year period, with the first Protocol valid for 3 years, 2006–2009. It provides fishing opportunities for 4 tuna purse seiners and 10 surface long-liners in the Solomon Islands' EEZ. In return, the EU pays financial contribution of € 400,000 per year, which entitles the EU vessels to catch up to 6,000 tonnes of tuna per year. If the vessels catch more than this amount, the EU will pay an additional € 65 per tonne (up to a total of €1.2 million per year). From the second year of the Protocol, the number of purse seine licences may be increased, on request of the Community, if resources permit and 'in accordance with the Palau Arrangement yearly limitations'. For each extra purse seine licence granted, the EU will pay an extra € 65,000 in financial contribution.

The FPA with the Solomon Islands was the first FPA signed with the EU worldwide, and is one of the three EU fishing agreements in the Pacific — together with the FA with Kiribati in 2003, and the FPA with the Federated States of Micronesia which was agreed in 2004. This move into the Pacific is considered to be a strategic expansion of EU fleet activities and the network of fishing agreements, into the most productive tuna fishing grounds in the world.

4.4.2 Fisheries and fleet activities

There are two main fisheries in the Solomon Islands:

- Rural subsistence and semi-commercial fisheries harvest coastal and inshore resources for subsistence and sale. Harvesting is focused in reefs and lagoons with some fishing of nearshore pelagics and reefslope demersal species. Catches include a wide range of reef finfish, beche-de-mer, greensnail, pearl oyster, clams, rock lobsters and other shellfish.
- Industrial fisheries including the domestic and foreign access tuna fisheries and the commercial shark fishery.

Solomon Islands has agreements allowing access to foreign vessels from a number of different countries (Table 4-10). In 2006, 289 commercial shark and tuna fishing vessels were licenced. Annual tuna catches have varied between 24,000 tonnes and 99,000 tonnes in the period 2001 to 2005, most of these from foreign vessels. The 2005 catch is estimated at 93,087 tonnes. Overall data is not available, but 900 people are employed in the domestic tuna fishery catching and processing sectors.

Solomon Islands has recently approved an arrangement for Trimarine to operate four vessels based in Solomon Islands to increase production through the Soltai cannery from 35 tonnes per day to 80 tonnes per day.

There are not yet any data available on catches of EU vessels for Solomon Islands' waters, as the agreement entered into force on 9th October 2006. Table 4-11 summarises the available data on catches by Spanish vessels in the Western and Central Pacific Ocean

(WCPO). Total catches are low because the vessels generally operate in the Eastern Pacific and only occasionally fish in the WCPO. Catch rates are generally higher than other fleets which average 25-35 tones per day, because the EU vessels are newer and larger. Some of the newer Taiwanese-built vessels achieve comparable daily catches.

Table 4-10 Fishing access agreements signed by the Solomon Islands

Country	Agreement type	Vessel type
EU	Bilateral	Longline, purse seine
Japan	Bilateral	Longline, pole & line, purse seine
Korea	Bilateral	Purse seine
New Zealand	Bilateral	Purse seine
Taiwan	Bilateral	Longline, purse seine
Other Pacific Island Countries	Regional arrangement	Purse seine
United States	Multilateral	Purse seine

Table 4-11 Catch rates for tuna and tuna-like species in Solomon Islands

Year	Vessels active	Days fished	Skipjack			Yellowfin			Bigeye			Other	Total	
			Catch	CPUE	%	Catch	CPUE	%	Catch	CPUE	%	Catch	Catch	CPUE
1999	8	154	5,670	36.82	66	1,506	9.78	17	1,437	9.33	17	0	8,613	55.93
2000	12	325	6,427	19.78	50	2,825	8.69	22	3,644	11.21	28	2	12,898	39.69
2001	6	...	1,201	...	50	467	...	19	734	...	31	...	2,402	...
2002	1	5	142	28.40	66	24	4.80	11	48	9.60	22	0	214	42.80
2003	...	...	...	...	...	...	...	...	...	...	...	...	...	...
2004	...	...	3,479	21.59	63	1,196	...	22	842	...	15	...	5,517	...
2005	5	...	2,293	...	67	321	...	9	817	...	24	...	3,431	...

Source: SPC Tuna Yearbook, 2005

4.4.3 Negotiations with the EU

The two main drivers for Solomon Islands signing an FPA with the EU were:

- tuna catches had been consistently below the TAC and Solomon Islands was looking for a new partner to assist in optimal utilisation of the country's tuna resources;
- consultations with other Pacific Island Countries indicated that the EU was a relatively attractive and beneficial fisheries access partner.

The FPA was negotiated initially with a technical team of Solomon Islands officials and concluded with the Minister. Solomon Islands has a small but experienced team of officials that negotiate fishing agreements, supported where appropriate by FFA expertise. Solomon Islands received the ex-ante impact assessment reports.

The arrangements in the FPA are regarded as fair by Solomon Islands and seem to be fair by comparison with EU agreements with other Pacific Island Countries and Solomon Islands agreements with other fleets. The payments are less than those received by Solomon Islands for US vessels (although this is for a regional agreement) but higher than those received by Solomon Islands from other fleets, although this comparison is complicated by the need to take into account aid from other fishing states associated with their agreements. Overall, the terms of the FPA seem fair both to the EU and Solomon Islands.

Initial technical negotiations were held in association with a meeting of the WCPF Preparatory Conference in which both Solomon Islands and the EU were participating, and concluded on a single mission by Solomon Islands representatives to Brussels.

Multilateral and regional FPA issues

In 1998, the EU proposed a multilateral regional access agreement, but Pacific Island Countries advised that they could not consider a multilateral agreement at that time

because negotiations on the Western and Central Pacific Fisheries Convention were under way, and they did not want to enter into any new multilateral arrangements until this process was concluded. The EC then obtained a mandate from its members to negotiate bilateral agreements, and has continued to operate on that basis.

The Pacific countries are now keen to reactivate the concept of a multilateral FPA with the EU. However, the EC advises that it 'does not have the mandate to negotiate any access arrangement at regional level' (Donatella, 2007).

FPA details

For each tonne of tuna, the overall payment to the Solomon Islands is €100, split into €65 by the Community, and €35 by the shipowners through their licence fees. In general, the overall EU contribution is greater than for other fleets fishing in Solomon Islands waters. Korean, New Zealander and Taiwanese vessels pay 6% of the catch value (FFA, *pers. comm.*), but EU shipowners pay less than Asian shipowners, although they may also incur higher costs related to health and safety standards etc.

EU shipowners must pay a non-reimbursable advance for their licences, of €13,000 per tuna seiner vessel and €3,000 per longliner. This compares favourably to the advance payments paid by EU tuna vessels under FPAs in the Indian and Atlantic Oceans (Table 4-12), and is a reflection of the expected high catches in Pacific waters.

Table 4-12 Examples of advance licence fee payments in a selection of FPAs

	Advance licence fee payments (€)	
	Purse seiners	Longliners
Pacific		
Kiribati (2003 FA)	21,000	4,200
Solomon Islands	13,000	3,000
Micronesia	15,000	4,200
Indian Ocean		
Comoros	3,375	2,065
Mozambique	4,200	3,500 / 1,680 ¹
Seychelles	15,000	3,000 / 2,250 ²
Atlantic Ocean		
Cape Verde	3,950	2,900
Gabon	4,550	2,030
Mauritania	1,750	3,500

1 For longliners of more than 250 GRT and less than 250 GRT, respectively

2 For longliners of more than 150 GRT and less than 150 GRT, respectively

Of the financial contribution paid by the Community, 30% (€120,000) is expected to be used by the Solomon Islands for 'enhancing responsible fishing', implementing a sectoral fisheries policy, for which the detailed objectives and actions will be agreed in due course between the Solomon Islands and the EU.

As of March 2007, no EU vessels had yet been licenced, and no fishing had taken place by EU fishing vessels, although the agreement only came into force in October 2006. There are no landing requirements or incentives in the FPA and initially, EU boats are not expected to land in-country – and nor do other foreign access licenced vessels. However, Solomon Islands has embarked on plans to encourage, by way of policy initiatives, the landing of catch from foreign vessels as part of an initiative to increase domestic production in the pursuit of onshore investment led development and because onshore tuna processing facilities are under-utilised.

4.4.4 Dependence of the national budget on the FPA

As noted above, €120,000 will be committed to activities to enhance responsible fishing in Solomon Islands waters. Solomon Islands has included provision for this funding in the 2007-2008 government budget, subject to the approval of proposals in accordance with the terms of the FPA.

The balance of the funds (€ 280,000 plus any extra resulting from exceeding the catch reference tonnage, or issuing of extra licences in subsequent years) will be used for general government expenditure. Fishing fees will contribute around € 5,000,000 to Solomon Islands' government revenue in 2007-2008, including at least € 400,000 from the FPA. The fishing fee revenue is critical for Solomon Islands' socio-economic development, in particular because of the damage done to the economy from a sustained period of civil unrest.

4.4.5 Potential conflicts and food security issues

The level of fishing provided for within the FPA is consistent with the limits on fishing in the National Tuna Development and Management Plan, including a national tuna purse seine TAC, as well as the Palau Arrangement and relevant decisions of the WCPFC. A zoning system is used to avoid conflicts between foreign vessels and national fleets.

There are not expected to be any adverse impacts on the food security of the Solomon Islands. Foreign exchange earnings from the FPA are expected to contribute to increased access to imported food for Solomon Islands people.

4.4.6 Processing and trade issues

Overall data are not available, but the overall value of seafood exports is estimated at € 7 million in 2006. Solomon Islands is one of the few Pacific states that has tuna processing capacity (the other main one being Papua New Guinea). Canned tuna is exported regionally, although it was exported to wider international markets including the EU before civil unrest disrupted production. Tuna products are exported to Japan (frozen, smoked tuna and fresh at times), Europe (loins and in the past canned tuna), US (frozen and in the past canned), regional markets (canned and frozen) and Bangkok (frozen tuna). Whole fish are transhipped to a range of destinations for canning, mostly to Thailand. The EU vessels operating in other Pacific Island Countries tranship; the main destinations of the catches are understood to be Europe, the US and Thailand.

Solomon Islands is currently on List 2 for exports to the EU, and has bilateral sanitary arrangements with Italy and Spain. There is substantial work underway, funded in part by the EU to upgrade the national capacities to apply EU sanitary standards. This should facilitate exports to the EU market, which should in turn enable increased value-added to be captured locally from the tuna resources, although there are concerns among ACP countries that the current preferential EU market access conditions they enjoy may be reduced with the reduction of trade tariffs (MRAG, in prep.). However, the processing sector suffers from a lack of raw material for processing. Landings from the tuna vessels that operate in Solomon Islands' waters are needed to support the processing industry. At present, there is no requirement for the EU vessels to land catches in Solomon Islands, but Solomon Islands is expected to encourage EU vessels to land catches for processing in future.

4.4.7 Coherence of EU development policies and the FPA

National fisheries policy

The goals of Solomon Islands' fisheries policy are:

- Ensure the orderly development and management of Solomon Islands fishery resources;

- Ensure Solomon Islands obtains optimum social and economic benefits from the use of its fishery resources.

The purposes of the policy are:

- Achieve self-sufficiency in the supply of fish to the domestic market;
- Increase income and employment from the sustainable development of fishery resources;
- Encourage aquatic fish farming;
- Encourage the processing of fishery resources into high value-added products.

Recently the Solomon Islands' government has launched policy initiatives aimed at increasing catch and onshore processing activity. Special consideration will be given to those companies that can demonstrate that their activities bring benefits to the domestic economy. In this respect the Solomon Islands is replicating the Papua New Guinea model by looking for both catching and onshore processing developments.

EU development policy

EU development objectives are focussed on reducing rural poverty and enhancing sustainable rural livelihoods as shown in Table 4-13 below. There was no EDF funding for fisheries under 9th EDF, when the FPA was signed. The scope of funding under EDF10 is still under consideration.

Table 4-13 Summary of EU Stabex and EDF Projects in Solomon Islands, 2005

Commitments and Payments from Stabex & EDF Projects in 2005 (NIP, SAP & EIB)				
<i>all figures in Euro</i>				
Project Number / Funding Source	Project Name	Date from	to	TOTAL FMO / FA
STABEX 98/003	STTA Soltai	2002	2003	
STABEX 98/009	Commercialisation of Seaweed	2005	2007	
STABEX 98/013	Sanitary Production of Fish Products	2005	2007	
8SOL5	Capacity Strengthening to Ministry of Health in area of Seafood			51,798
7SOL5	Fish Market 7 marketing ST. for Rural Fishing Ents. Pro	1992	1995	30,718
7SOL14	Evaluation of Rural Fishing Enterprises Project	1993	1995	14,025
7SOL20	Rural Fishing Enterprises Project	1994	1999	1,446,998
7SOL24	TA to Ministry Agriculture & Fisheries - Agric Economis	1994	1998	322,521
7SOL46	Rural Fishing Project Phase III	1999	2004	1,900,000
6SOL12	ST for Manager Fishing Vessels	1988	1991	43,834
6SOL17	Dev Rural Fishing Enterprises	1988	1996	567,252
6SOL19	Proj Coord Rural Fishing Enter	1990	1995	262,660
6SOL29	Rural Fishing Center Volunteer	1991	1995	53,516

Source: EU Delegation in Solomon Islands

The FPA will contribute to the national objective of capturing economic benefits from the fisheries. It remains to be seen to what extent the EU actually encourages local value added activities linked to the exploitation of tuna resources within the EEZ of the Solomon Islands. The provisions in the FPA will not necessarily help support the local processing industry as there are no obligations for local landings, and therefore is unlikely to have much impact on local value-added. There is a requirement for one Solomon Islander to be employed on each EU vessel, which may contribute up to 14 jobs per year.

Table 4-14 shows that Solomon Islands has received funding for fisheries from the EU's National Indicative Programme (NIP) under the 6th, 7th and 8th EDFs. When a fisheries agreement with the EU was on the horizon (FPA came into force in 2006, negotiations started several years prior to that), fisheries funding disappeared from the NIP. The Solomons continued to benefit from regional funding for fisheries under the 9th EDF, but it

seems that the FPA financing may have replaced EDF funding for fisheries. This supports the finding of the ADE (2002) study on coherence between EU fisheries and development policies. Over the 14 years from 1988 – 2002, a total of €4,693,322 was committed/paid to Solomon Islands from the 6th, 7th and 8th EDF, equating to an average of € 335,237 per year. This compares to € 400,000 per year from the FPA.

Table 4-14 Inclusion of fisheries funding in NIPs and RIPs, and the existence of an EU fishing agreement, over the period 1987-2007 in Solomon Islands

	1987-1992 (=6 th EDF)	1992-1997 (=7 th EDF)	1997-2002 (=8 th EDF)	2002-2007 (=9 th EDF)
FA / FPA	x	x	x	✓
Fisheries in NIP	✓	✓	✓	x
Fisheries in RIP	?	?	?	✓

4.5 Mozambique

4.5.1 Overview

Mozambique is situated on the eastern coast of southern Africa. Mozambique went for ten years without an agreement with the EU, but signed a fisheries agreement for tuna and deep-water shrimp from 2004-2006. After several rounds of negotiations, an agreement was reached recently for an FPA with the EU for access to tuna resources for 2007-2011. It is worth € 0.9 million a year, for a reference tonnage of tuna of 10,000 tonnes.

Mozambique has a population of approximately 20 million and is very poor country, with a per capita GDP of US\$ 335 (World Bank, 2005). Fisheries play an important role in the country's economy and to the livelihoods of a significant portion of the population. The fisheries sector is one of the main contributors to Mozambique's national economy contributing 14.3% of total exports by value, based mainly on the valuable prawn fishery (FAO, 1999b & 2002).

4.5.2 Fleet activity in Mozambique

Mozambique has joint ventures with Spain and Japan to exploit the shallow-water shrimp fishery and large pelagics such as tuna and swordfish. There is also an agreement with Thailand although relatively few Thai vessels are active in Mozambique. There are also agreements with EU associations Anabac and Opagac which provided fishing opportunities to French tuna vessels outside the previous EU fisheries agreement. Small-scale fisheries also provide employment and food security for around 70,000 fishers and their dependents (IDPPE, 2002).

EU vessels took up the opportunities for tuna licences provided for in the fisheries agreement (2004-2006) and are expected to take up licences under the FPA.

4.5.3 Negotiations and transparency

Mozambique first signed a fisheries agreement with the EU in 1987 for three years (1987–1989) for shallow- and deep-water shrimp, as well as tuna seiners and surface longliners. A further protocol was signed for the period 1992–1993, this time targeting only tuna. In 1990, Mozambique passed the Fisheries Law (Lei 3/90), in which the shallow water shrimp fishery was designated to be exploited only by Mozambican nationals or companies. Mozambique proposed to the EU to establish Mozambican companies which would charter EU vessels, but the EU did not agree. As a result the agreement was terminated in 1992, and Mozambique continued to develop its national fleet through its established joint ventures with Spain and Japan.

2004-2006 fisheries agreement: strong Mozambican negotiating power, but negotiations not based on demand from EU shipowners

In 2003, another fisheries agreement with the EU was negotiated, with a protocol from 2004–2006. This agreement was for tuna (35 tuna seiners and 14 longliners) and prawns. The EU wanted access to the shallow-water shrimp resources, but Mozambique stated early on in negotiations that this fishery was fully exploited by the national artisanal and joint venture fleets, and there was no surplus available for EU vessels to target²⁴. However, research suggested that the deep-water prawn fishery was not fully exploited, and half of the available surplus was provided for the EU vessels.

²⁴ Source: interviews with the EU Delegation in Mozambique and the Directorate for Fisheries Administration, Ministry of Fisheries, Mozambique.

Uptake of tuna licences was good (Table 4-15). In 2004, EU vessels exceeded the reference tonnage of the agreement, reporting catches of over 11,000 tonnes in Mozambique's EEZ. In 2005 and 2006, catches fell to their normal levels of around 2,000 tonnes.

In contrast, there was no uptake of the deep-water prawn opportunities (Table 4-16). This suggests that the agreement was not well negotiated as fishing opportunities were negotiated in the absence of demand from EU shipowners. The deep-water prawn opportunities were those for which 85 % of the € 4.09 million financial contribution was provided.

The EU indicated that the poor uptake was due to the high cost of licences for potential operators, and Mozambique accepted two successive reductions in the licence fee, but still there was no uptake of the opportunities. As a result, halfway through the agreement, the EU proposed denouncing it. Mozambique did not accept this, on the basis that they were not responsible for the lack of interest in the prawn opportunities. Alternatives that could make the agreement economically viable for the EU were discussed, but the agreement was allowed to run its course unchanged.

Table 4-15 Uptake of tuna licence opportunities in Mozambique's 2004-2006 FA

Year	No of licences available		Number of licences issued		% utilisation		Average utilisation
	Purse seine	Longline	Purse seine	Longline	Purse seine	Longline	
2004	35	14	33	10	94.3 %	71.4 %	82.9 %
2005	35	14	35	14	100 %	100 %	100 %
2006	35	14	35	14	100 %	100 %	100 %
Average					98.1 %	90.5 %	94.3 %

Source: EU Delegation to Mozambique; Ministry of Fisheries, Mozambique

Table 4-16 Uptake of deep-water prawn licences in Mozambique's 2004-2006 FA

Year	No of licences available	Number of licences issued	% utilisation	Average utilisation
2004	10	0	0 %	0 %
2005	10	0	0 %	0 %
2006	10	0	0 %	0 %
Average		0	0 %	0 %

Source: EU Delegation to Mozambique; Ministry of Fisheries, Mozambique

Table 4-17 Total catch of tuna and tuna-like species by EU vessels under Mozambique's 2004-2006 FA

Year	Total tuna catch (t)
2004	11,213.7
2005	~ 2,000
2006	Final catch figures not yet confirmed

Source: EU Delegation to Mozambique

2007-2011 FPA: difficult negotiations finally agreed for political and diplomatic motives

Negotiations for the FPA began in May 2006. There were three rounds of negotiations and a technical meeting, which all ended without agreement. There were reports in November 2006 that Mozambique was not going to sign the FPA with the EU. The main issues were:

- Financial contribution was very low (€ 0.9 million) compared to the previous FA (€ 4.09 million). This reduction was due to the FPA being only for tuna, not for demersal (prawn) opportunities.
- Requirements for the employment of ACP seamen in vessel crews did not guarantee jobs for Mozambicans. Mozambique wanted this to state 'Mozambican seamen' not 'ACP seamen'; the EU wanted to maintain the flexibility of 'ACP seamen' to avoid having come into port to pick up and drop off Mozambican crew, which would result in a significant loss of fishing time. A compromise was reached that specifies a certain percentage of the ACP seamen should be Mozambican 'when possible'.
- In addition to mention of IOTC measures in the agreement, Mozambique wanted other relevant regional bodies to also be mentioned, such as the Southern African Development Community (SADC) and the South West Indian Ocean Fisheries Commission (SWIOFC). The EU did not accept this, because they are not a member of these regional organisations. As a result Mozambique also said it was not a member of IOTC, which therefore also should not be mentioned in the agreement. IOTC was included in the final text because of the scientific issues related to managing tuna, regardless of Mozambique being a member or not.
- A dispute between France and Mozambique over EEZ issues related to French islands in the Mozambique Channel mean that the FPA does not talk about the 'EEZ' but the 'Fishing Zone'.

Despite the problems with the negotiations, the FPA was eventually signed during the week of 22 December 2006. During negotiations, on a sectoral level, the Ministry of Fisheries did not reach agreement with the EU on the value of the financial contribution. However, the Government of Mozambique (Council of Ministers) decided that the agreement would be signed, taking into account a wider vision of the partnership between Mozambique and the EU.

The Ministry of Fisheries expressed dissatisfaction with the FPA, mainly because of the relatively low level of financial contribution compared to the previous FA, and does not believe that it represents a 'partnership' for the fisheries sector, in particular because of the way the negotiations were concluded.

The FPA provides fishing opportunities for 89 vessels and came into force on 1 January 2007. As of 29 January 2007, no licences had yet been requested by EU vessels under the agreement.

FPA vs private licence fees – lower for EU shipowners under the FPA, but higher overall contribution for Mozambique

In addition to the FA and FPA, Mozambique also has long-standing contracts with European tuna associations, Anabac and Opagac. Under these contracts, EU vessels (mainly French) purchase private licences outside of the EU fisheries agreements. This occurred during the 2004-2006 FA, perhaps because the FA did not provide for sufficient fishing opportunities for all the EU vessels that wished to fish in Mozambique's EEZ.

A comparison of the licence fees paid by vessels within the FA or FPA, and the private licence fees paid by the vessels under the direct arrangements with the Government of Mozambique, allows us to assess whether the EU shipowners are paying the 'market rate' for fishing opportunities under the fisheries agreements (Table 4-18), and the viability of fishing operations paying private licence fees.

EU shipowners pay less upfront and less per tonne of tuna (€ 35 per tonne) for their licences under the FPA than they would if they were to buy a licence directly from the Government of Mozambique outside of the agreement (€ 45–50 per tonne) (Figure 4-5). The private licences involve an upfront payment of \$18,000 which is valid for up to 300 tonnes catch. Any catches above this reference tonnage are subject to an additional payment from shipowners.

A number of EU vessels purchased licences outside the FA during the period 2004-2006. They are therefore willing to pay these higher amounts for the fishing opportunities in Mozambique's EEZ. This suggests that EU vessels under the FA and FPA are paying less than the market rate. The proportion of the financial contribution paid by EU shipowners could be increased to bring it into line with the amounts they pay for private arrangements.

The overall income to Mozambique per tonne of tuna is greater under the FPA (€ 100–127 per tonne) than under private arrangements (€ 45–50 per tonne). One of the benefits of an FPA to the shipowners is in lower up-front licence fee payments. This provides greater flexibility for shipowners to possess a network of access rights for the region, whilst minimising the risk of low catches in any particular EEZ. The benefit to the coastal state of an FPA compared to private arrangements is in the higher overall financial contribution. However, currently the EU shipowners enjoy the added benefit of lower licence fee costs overall, than under private arrangements.

Table 4-18 Comparison of licence fees for private licences vs FPA licences

Agreement and vessel type	Upfront fee (\$)	Upfront fee (€) ¹	Reference tonnage (t)	Cost (€ per tonne)
Private licence fees for foreign vessel				
Foreign purse seiner	18,000	13,702	300	45.67
Foreign longliner	20,000	15,224	300	50.75
Licence fees under the FPA				
EU purse seiner		4,200	120	35.00
EU longliner (>250GRT)		3,500	100	35.00
EU longliner (<250GRT)		1,680	48	35.00

1 – Exchange rate: € 1 = \$ 1.3137

Table 4-19 Total cost to the EU per licence and per tonne of tuna under the FPA

	EU financial contribution per licence (€) ¹	Upfront fee (€) paid by shipowners	Reference tonnage (t)	Cost (€ per tonne) ²
Total contribution to Mozambique from shipowners and Community				
EU purse seiner	11,043	4,200	120	127
EU longliner (>250GRT)	9,202	3,500	100	127

1 – This value has been calculated by taking the total financial contribution (including the payment for sustainable fisheries) and dividing it between the number of licences for each category, weighted according to the tonnage of tuna that the shipowner licence fees pay for upfront. As it is not known how many longliners of each size category will request licences, longliners less than 250GRT were not included in the analysis.

2 – The total cost to the EU per tonne is higher than the stipulated €100/tonne because of the extra payment of € 250,000 for 'promoting sustainable fisheries'. This therefore represents the total cost to the EU, per tonne of tuna provided for in the agreement.

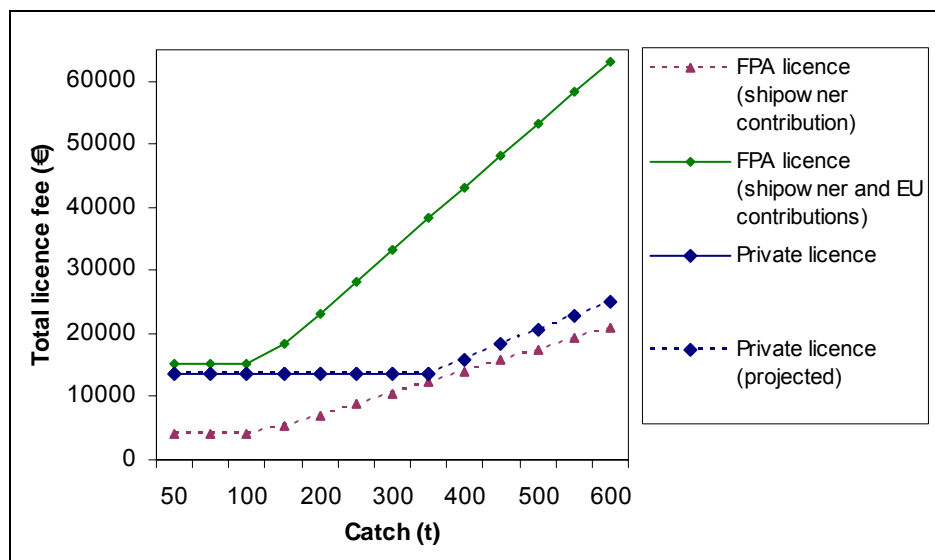


Figure 4-5 Average income for the Government of Mozambique per purse seine licence at different levels of catch for private licences and FPA licences (shipowner contributions and shipowner + EU contributions)

Note: Shipowner and EU contributions calculated for average value per licence, assuming all licences are taken out. Private licence fee above a catch of 300 t based on the price per tonne of the advance payment.

4.5.4 Targeted actions

Fisheries authorities welcomed targeted actions to ensure financing for the sector

Under the 2004-2006 FA and the 2007-2011 FPA, 100% of the financial contribution was identified for targeted actions or partnership actions in the fisheries sector. The high level of reinvestment of the money in the sector is welcome by the fisheries authorities. The fact that they are able to maintain control of all of the funds from the fisheries agreements reflects the power of the fisheries sector in Mozambique.

The Ministry of Fisheries indicated that they preferred the targeted actions approach to the partnership actions, because it provided a more structured framework for the use of the funds, which was more straightforward to control and report on.

Low utilisation rate of targeted actions calls into question their effectiveness in ensuring sustainable management

Information from the EU Delegation in Mozambique indicates that the utilisation of the financial compensation from the 2004-2006 agreement was low (Table 4-20).

Table 4-20 Utilisation rate of financial compensation in Mozambique

Year	Utilisation rate of funds
2004	40 %
2005	20 %
2006	20 %

So far, the impact of targeted actions on fisheries management appears to be limited. However, there were some delays in the transfer of funds to Mozambique. The financial compensation payment for 2004 was received in July, for 2005 was received between July and August, but for 2006 was only received in November. Funds have been reserved for

the purchase of new MCS vessels, and for the construction of a new building for the Ministry of Fisheries. The remaining funds will be put into a training fund.

The potential impact of the partnership approach on fisheries management is unlikely to be much different from the targeted actions approach. In both cases, the coastal state has complete discretion over the use of the funds. This means that they may or may not be put towards actions that will have a positive impact on responsible fisheries management. Furthermore, the value of the financial contribution in Mozambique for the FPA compared to the FA is much smaller, which indicates its potential impact on fisheries management is also much smaller. The costs of MCS activities and equipment, and fisheries research and stock assessment are very high, and € 900,000 a year will not go very far towards funding a comprehensive MCS and fisheries management programme.

The use of targeted action (TA) funds for research contributed to increasing the presence of the Fisheries Research Institute in the provinces, and improving the coverage and quality of catch and other data (in particular for small-scale fisheries). However, the TA for MCS, which has the potential to contribute significantly to responsible fisheries management, had a utilisation rate of only 16 %. The ex-post evaluation concluded that the impact of the agreement on improved MCS was 'limited, due to the poor utilisation of funds, the lack of any decision regarding investment in a patrol vessel, and the continued absence of an effective observer programme'. However, there are still plans to purchase or charter vessels for carrying out patrols using the TA financing, in particular during the closed seasons.

4.5.5 Compliance issues

Non-submission or late submission of catch reports

Under the 2004–2006 FA, there were problems with late submission of catch data from EU vessels. These data should have been sent to the Ministry of Fisheries, with a copy to the EU Delegation, within 45 days of the end of each fishing campaign. However, the situation improved during the implementation of the agreement²⁵. Some French vessels did not always provide catch data disaggregated by species.

Not informing authorities of entrance to and exit from the fishing zone

There appears to have been a lack of compliance by EU vessels in providing entry and exit notices. This resulted in the Mozambique authorities being unable to cross-check vessels' catch declarations, as they did not know which vessels were present in the fishing zone on any particular day. Vessels should provide catch declarations for every day they are present in the fishing zone, regardless of whether they caught anything or not.

Non-implementation of VMS protocol

A VMS Protocol was signed between the parties in 2004, but has never been fully implemented. The MCS operations unit in the Ministry of Fisheries has limited capacity and experienced both hardware and software problems. Currently, the implementation of the protocol under the FPA depends on Mozambique's VMS provider upgrading the software to ensure security of data transmission from Member States' MCS authorities.

4.5.6 Coherence of EU development policies and the FPA

National development policy

Fisheries have long been recognised in Mozambique as 'an important sector in the struggle against poverty and the promotion of economic growth, particularly given the large involvement of small-scale producers' (Republic of Mozambique, 1999). The latest Poverty

²⁵ Information from interviews with the EU Delegation and the Directorate for Fisheries Administration, Ministry of Fisheries, Mozambique

Reduction Strategy Paper for 2006-2009 identifies fisheries as a priority sector for economic development. The sector 'will continue to follow strategies aimed at ensuring permanent access to the international market for Mozambican fishery products, which requires taking action in the realm of quality control by consolidating fisheries inspection services, improving competitiveness and diversifying the list of domestic products available for export'. Support to non-industrial fishing will be focussed on improving the living conditions of fishing communities, ensuring sustainable exploitation of resources and increasing the supply of fish to the domestic market (Republic of Mozambique, 2006).

EU development policy

The Country Strategy Paper and National Indicative Programme for the 9th EDF (2002–2007) do not directly address fishery sector development. However, the infrastructure and macroeconomic support sectors will indirectly contribute to the fisheries sector, and small-scale fisheries may be included in the rural development component. The private sector and trade components may also support the fisheries sector. Mozambique also benefited from the EU-funded regional Monitoring, Control and Surveillance Programme.

Mozambique's fisheries policy

Mozambique's overarching fisheries policy is defined in the 1996 Master Plan (Republic of Mozambique, 1996). This includes increasing the standard of living of the fishing communities (and creation of jobs in the sector), making the fishing administration (the Ministry and its associated institutions) financially sustainable, and ensuring the contribution from the fisheries sector to the national economy.

The overall objective of the more recent fisheries sector development plan (Republic of Mozambique, 2002) is to contribute to sustainable economic growth, reduce unemployment and reduce and eliminate absolute poverty. To achieve this, the specific objectives are to:

- Improve the supply of fish to the domestic market to reduce the country's food deficit;
- Increase foreign exchange earnings by the sector; and
- Improve the living conditions of fishing communities

FPA

The FPA is not incoherent with the national fisheries and development policies or EU development policy in Mozambique. However, it is unlikely to contribute significantly to the sector's objectives and to the national objective of poverty reduction.

The FPA will contribute to government income and the foreign exchange earnings of the sector through the financial contribution payment, although this represents a small proportion of funding for the sector (3% of the estimated budget of the Ministry of Fisheries, down from 16% under the FA). It is not expected to contribute to exports (as there is no requirement for EU vessels to land in Mozambique, and based on the execution of the previous FA, vessels will not land catches locally), and is unlikely to contribute significantly to job creation for Mozambicans (there is no requirement for employment of Mozambican crew, only 'ACP seamen' and where possible, Mozambicans). Whether or not the joint ventures provided for in the FPA will contribute to building up Mozambique's national fleet or processing capacity remains to be seen.

The FPA is not expected to have any impact (positive or negative) on food security, as the vessels will be exploiting tuna resources that are not usually destined for local consumption. Conflicts with small-scale fishers are also not expected because the EU vessels will be fishing beyond the zone of operation of small-scale fisheries. Minimal value-added is expected from the FPA, as the vessels are not expected to land in-country (therefore there will be no local processing either), use local port services or employ local crew.

4.6 Non-EU fishing agreements

Coastal states with 'surplus' fish stocks may sign agreements with a number of distant water fishing nations, providing them with access to fishery resources. Whilst this study concerns itself primarily with the EU fishing agreements and their recent evolution to Fisheries Partnership Agreements, it is useful to compare these with agreements with agreements with other DWF nations that may be available to coastal states.

The most common non-EU DWF nations involved are Japan, Russia, Korea, China, Taiwan and the United States.

Information regarding the non-EU agreements is very difficult to obtain. Most of the non-EU agreements are not publicly available. This in itself demonstrates the much greater transparency of the EU agreements, which are available on the internet in their entirety, including financial information.

Of the non-EU agreements, some older agreements (from 1980s and early 1990s) are available, and a few more recent ones (Russia-Mauritania, China-Papua New Guinea). These, together with the older agreements, can be used to comment on the general structure of the agreements and their provisions, and compare them to the EU agreements.

4.6.1 Examples of non-EU agreements

The following list provides some examples of non-EU agreements. We have copies of the agreements for the first ten listed and further information on these is provided in Annex 2.

Recent agreements

- Mauritania – Russia (2003-2006)
- Mauritania-Ukraine (2003)
- Mauritius – Japan (2000-2006, with an amendment in 2003)
- US Regional agreement – Pacific States (1988-2003)
- China – Papua New Guinea (2002-2007)

Older agreements

- Gambia – Japan (1984)
- Cook Islands – China (Taiwan) (1984)
- Tuvalu – Korea (1982-1983)
- Palau – Japan (1987 – 1988)
- New Zealand – Korea (1978 – 1982)
- Senegal – Spain (pre-EU accession) (1985 – 1987)
- Guinea – China²⁶ (current) (Guinea gives access to around 150 foreign vessels representing approximately 50,000 tonnes of fish per year, including an agreement with China²⁷)
- Cote d'Ivoire – Japan Fishing Cooperative Association (current) (These agreements are reportedly non-implemented. In addition Cote d'Ivoire has a regional agreement with Guinea and Guinea Bissau.)

The agreements between Gambia - Japan, Cook Islands - China (Taiwan) and Tuvalu - Korea are all tuna agreements. Although they are all with different distant-water fishing nations, they all have a very similar format, content and conditions. Very few restrictions are placed on the foreign boats, there are no provisions for inspection, monitoring and

²⁶ EC National Indicative Programme, 2002

²⁷ Source: Proposed council regulation for 2004-1008 agreement)

control or observers, and no maximum catch limits. It is simply a case of 'pay, fish and go'. These agreements are old (from the 1980s) so more recent agreements between these countries may have improved. However, compared to EU agreements from the same period, they provide fewer provisions for rational and sustainable resource exploitation.

The agreement between New Zealand and Korea is also a tuna agreement, but differs in the respect that access is being granted to New Zealand's EEZ, rather than to a developing country EEZ. The capacity of New Zealand for fisheries management and negotiation is greater than many developing and developed countries, and this is reflected in more stringent regulations on inspection and monitoring, conservation of stocks etc. than many developing countries enjoy in allowing foreign fleets access to their waters. Licence fees and compensation payments are not specified in the New Zealand agreement. It is expected that these are covered in national legislation. A maximum catch is established, on the basis of stock assessment, TACs and assessment of surplus stocks.

The 1984 agreement between Angola and Spain, and the 1985 agreement between Senegal and Spain, although not directly comparable to the above Asian agreements (the Spanish agreements are for mixed fisheries – demersal, shrimp and tuna, whereas the Asian agreements are exclusively for tuna), stand out as being more detailed and demanding more from the Spanish vessels in terms of landings, inspections etc., and offer more by way of counterpart (stock assessments, training, a Commission to monitor and review the agreement, greater financial compensation) than do the Asian agreements.

4.6.2 General structure of the agreements

There are two main types of non-EU agreement: the US multilateral treaty with Pacific Island Countries; and the East Asian agreements between fishing associations and coastal states. Ex-soviet (e.g. Russian and Ukrainian) agreements seem to follow a similar structure and approach to the East Asian agreements, although tend to be between governments rather than between a fishing association and coastal state government.

The US-Pacific access treaty is the only DWF access agreement that takes a multilateral rather than bilateral approach. The agreement targets tuna, a highly migratory and straddling stock, making the regional approach particularly appropriate.

The East Asian agreements are often 1-3 years in length and are renewable on an annual basis. The agreements can be 1-4 pages in length and set the basic framework for fishing activities in the EEZ of the coastal state. The available agreements generally do not provide any information on catch limits and usually provide no information on the number of vessels or licence fees to be paid. The agreements usually specify that the 'details' for implementation of the agreement will be dealt with in separate subsequent agreements – which are never available in the public domain. It is assumed that more detail on the fishing possibilities and financial compensation would be included in these other documents.

4.6.3 Financial compensation associated with non-EU Agreements

It is difficult to evaluate the financial compensation associated with non-EU fishing agreements, as the financial or in-kind payments associated with the agreements are not usually made public. Access to fish resources may be provided in exchange for technical assistance, development aid or other goods and services, with or without an extra financial payment. An agreement between Palau and Japan provided goods and services for fisheries development to Palau, with an attached memorandum of understanding explicitly stating that it was on the condition of approval by Palau of a pending fisheries agreement. Agreements with Japan are often associated with development aid for infrastructure projects in the fisheries sector, such as port development. China's approach to access to

natural resources also often involves payment of compensation or provision of development aid, in return for infrastructure projects and access to natural resources including oil, minerals, forestry and fishery resources.

Where non-EU vessels pay a licence fee based on a percentage of the catch value, revenues from agreements with the EU are lower than revenues from Japanese or Korean longliners, but higher for purse seine fisheries. In the Pacific, Japan and Korea pay 6% of the catch value in licence fees (FFA, *pers. comm.*). This compares to 2% and 13% of the catch value paid by the EU, for longline and purse seine fisheries, respectively (see section 3.2.1).

In the past, revenue from EU agreements also seems to have been higher than from non-EU agreements. The average fee received by the coastal states (whether in the form of a compensation payment in return for a set number of licences, or payment of individual licences) was in the region of US\$ 1,000 for a longline licence and \$ 5,000 for a purse seine licence (over the period 1982-1992). In comparison, in the same period (1984-1986) the EU was paying € 738,000 (financial compensation plus shipowner contributions for licences) for 27 licences for ocean-going tuna vessels in the Seychelles, equating to € 27,300 per vessel, plus a further €120,000 contribution from the shipowners in licence fee payments. The EU was paying in total between 6 and 30 times as much as an agreement with, for example, Korea, Japan or Taiwan.

However, financial compensation paid under the US-Pacific multilateral treaty is higher than under EU agreements. In 2003, 16 US purse seine vessels fished in the WCPO area under the agreement, catching 94,003 tonnes of tuna (Mwikya, 2006). Taking an average catch value of US\$1,000, the US\$21 million compensation paid equated to about 22% of the value of the catch.

At the present time, however, the licence fees paid by foreign shipowners are often higher than the fees paid by EU shipowners, although total revenue for coastal states is usually higher under EU agreements. It could be argued, however, that because of the more demanding nature of the FPAs with respect to reporting and operating responsibilities for the vessels, there are a number of hidden costs which non-EU vessels do not face. In Mozambique, foreign tuna purse seiners or long liners pay \$ 18,000 – \$ 20,000 (€ 13,700 – € 15,200) per year for a licence, with extra payments made for any tonnage caught over a reference tonnage of 300 tonnes. EU vessels under the FPA pay € 4,200 (purse seiners), € 3,500 (longliners over 250 GT) or € 1,680 (longliners under 250 GT) for reference tonnages of 120 tonnes, 100 tonnes and 48 tonnes respectively. An extra € 35 per tonne is paid for any catch over these reference amounts. These sums are less than the amounts paid by other foreign vessels (see Mozambique case study). However, once the EU contribution is taken into account (€ 65 per tonne), the overall payment received is higher than those made by foreign vessels outside the FPA — for 300 tonnes, the EU shipowner FPA licence fees would be € 10,500, but the total EU payment would be € 30,000. In Madagascar, standard fishing agreement protocols for foreign tuna vessels indicate that monthly licence fees would be between \$ 3,000–\$ 5,000 for a tuna seiner and \$ 2,000–\$ 4,500 for a longliner, depending on the ship's GRT (MAEP, 2006).

The US-Pacific multilateral treaty provides a defined amount of financial compensation in return for fishing for a defined period. Under this treaty, the Federated States of Micronesia (FSM) received annual payments ranging from € 432,186 to € 5.5 million in the years 1998 to 2003. In 2002 total fishing fees collected were € 8.6 million²⁸. The US treaty, like the EU FPAs, is published and available in the public domain. The disadvantage is that there are no limits on catches, which may compromise stock sustainability.

²⁸ Executive summary of the ex-ante evaluation of the EU agreement with Micronesia.

Table 4-21 Comparison of the payments made under non-EU Agreements

Country (Agreement)	Date*	Fishery	No. vessels	Access fee	Licence fee	Average fee/tonne	Source
Mozambique (private agreements, inc. EU vessels not under FA or FPA)	2005	Tuna	?	?	\$18,000 (PS) \$20,000 (LL)	€45–€50 per tonne	Ministry of Fisheries, Mozambique
Seychelles – Taiwan Deep Sea Tuna Boat-owners and Top Fortune		Tuna (LL)	-	-	€1.41 million/year in total		Seychelles case study
Seychelles – Japanese Fisheries Cooperative Associations		Tuna	-	-	\$0.67 million/year in total		Seychelles case study
Seychelles – Korean private agreements		Tuna			€0.10 million/year in total		Seychelles case study
Seychelles general agreements	2003	Tuna			€60,000 for seiners licences/year		Seychelles ex-ante evaluation
Mauritius – Japan	2000-2006	Tuna (LL)	20	-	\$6,000/LL licence for 90 days; \$2,000 for additional 30 days		Mauritius ex-ante evaluation
Madagascar – fisheries agreement template	Current	Tuna (PS and LL)		\$1,000 for the right to enter EEZ	PS: \$3,000-5,000 per month; LL: \$2,000-\$4,500 per month (dep. on GRT)		Min. of Environment & Natural Resources
US – Pacific multilateral treaty	1988 (data for 2003)	Tuna	16 PS	\$21 m	?	22% of catch value**	Mwikya 2006
Pacific – Asian tuna agreements (various)		Tuna				6% of catch value	FFA, pers comm.
Mauritania – Russia	2003-2006	Not specified	Not specified	Not specified	Not specified		Mauritania-Russia Agreement
Mauritania – Ukraine	2004	Not specified	Not specified	Not specified	Not specified		Mauritania-Ukraine Agreement
Gambia – Japan	1992	Tuna (LL & PS)	No limit	None	LL: \$1,000/3 months PS: \$5,000/5 months		Gambia-Japan Agreement
Cook Islands – China (Taiwan)	1984	Tuna (Longline)	50	\$57,500/year	None (covered by access fee) \$1150/LL Licence)		Cook-Islands–China Agreement
Tuvalu – Korea	1982-1983	Tuna (Longline)	60	\$70,000/ 14 months	None (covered by access fee: \$1167/licence)		Tuvalu-Korea Agreement
Senegal – Spain	1985-1987	Mixed (tuna, hake, shrimp)	30 ST, 42 LL, 15 PS, 19 FT***		ST: CFA 25,000 FT: CFA 11,250 LL: CFA 6/kg PS: CFA 7.5/kg	LL: CFA 6,000/t PS: CFA 7,500/t	Senegal-Spain Agreement
Angola – Spain	1984	Shrimp, Tuna (PS)	45 shrimp/crab 10 PS	\$300,000 for shrimp and 2.1 tonnes fish for each tonne of shrimp	\$40,000 total paid by shipowners (\$4,000/tuna licence Shrimp: \$6666/licence		Angola-Spain Agreement

*Where there is no date, it is assumed to be a current agreement

** Total, from shipowners and government payments

***ST = Shrimp trawlers; FT = Fish Trawlers

5 Impact Assessment

Issues which determine whether or not there are positive impacts for ACP partner countries can be considered under economic, social, environmental and institutional headings. The methodology for Sustainable Impact Assessments used by DG Trade is provided in Annex 7, but we have also drawn from the more general EU impact assessment guidelines SEC(2005)791 (see Annex 7). Cost–benefit analysis and value for money issues linked to fishing agreements and FPAs are considered in Section 5.5.

It is currently not possible to fully assess the impacts of the FPAs since they have been in operation for such a short time. However, based on experience of previous fishing agreements, the changes adopted in FPAs and drawn from the analysis in Section 3, matrices have been developed of their potential positive and negative impacts. These cover economic, social, environmental and institutional impacts. The full tables are included in Sections 5.1–5.4 and a summary table is provided in Table 5–1 of the Executive Report. Overall, most positive impacts are likely to accrue to the EU, and most of the potential negative impacts to the coastal state. In the future, once the impacts of FPAs become clearer, these matrices can be used with stakeholders to rank the impacts in order of importance and to identify strengths, weaknesses and coherence issues.

5.1 Economic impacts

Positive and negative economic impacts are summarised for the EU and the developing country in Table 5-1.

Whilst the financial contribution from FPAs contributes to the generation of resource rents from fisheries, in most cases the major economic benefits to be gained from a fisheries agreement are through the level of value-added. This depends on the activity of EU vessels in port, and whether they land or tranship fish locally or whether it is taken directly to markets or processing factories in Europe. Although these factors are partly driven by requirements in the FPA (e.g. for transshipment, local landings and use of local services) they will also be driven by market factors, and whether the local ports have the required infrastructure in place. It may be difficult for coastal countries to enforce transshipment requirements, and vessels may easily move out of the EEZ to undertake these activities.

The new FPAs generally include a clause to encourage joint enterprises or investment within local enterprises, but there are few details on how this can be achieved in practice. This could benefit a national industrial fleet, but in reality it appears that a conclusion of an agreement leads to less investment or support to the national fleet and competition with the more efficient EU vessels.

However there are also costs associated with an agreement, including the negotiating and administrative costs as well as the investment required in the fisheries sector itself (e.g. for MCS and catch monitoring).

For the EU, the main economic benefits are accrued by the private shipowners who can access valuable fisheries resources and much of the negotiation and administrative costs of the agreement are covered by public funds. The EU processing sector also benefits from an assured supply of fish for processing, maintaining jobs and turnover. EU vessels may incur higher operating costs than non-EU vessels. They must adhere to certain social (e.g. labour standards), safety and sanitary conditions. This may make them less competitive against non-EU foreign fleets that do not have to adhere to the same labour and quality standards.

Table 5-1 Potential positive and negative economic impacts of FPAs for the EU and developing countries

	European Union	Developing country
Public Revenue	<ul style="list-style-type: none"> + Tax revenues from fisheries & processing sectors to MS (mainly Spain, France, Portugal, Italy) - Cost of FPA – financial contribution and administration costs, and in some cases the opportunities are not fully utilised) 	<ul style="list-style-type: none"> + Means of extracting economic 'rents' from the fishery resources + Contribution to national budget and fisheries sector + Reliable, constant source of income, easier to plan budgets + Potential for immediate revenue source with minimal investment cost + Revenue from licence payments (although income may fluctuate depending on demand) + Revenue from port taxes, rates and other fiscal payments, if vessels land in-country - If negotiated without full knowledge of the resource's potential, may lead to a loss of resource rents - Loss of tax due to concessions given to DWF vessels (no taxes paid where DWF vessels do not land, bunker or tranship in ACP ports) - Cost of negotiating agreement - Cost of implementing agreement (MCS, VMS, observer programmes) - Cost of investment in ports and infrastructure for DWF vessels
Private Income	<ul style="list-style-type: none"> + Access to valuable fishery resources + Supply of raw material to processing industry + Licence fees and advance payments are lower than outside of FPAs + FPA reduces administrative costs for private sector by negotiating agreement on their behalf - Operating and capital costs - Cost of licence fee and advance payments increasing 	<ul style="list-style-type: none"> + Expenditure of EU vessels in ports + 'Originating' supply of fish for processing sector, if EU vessels land in-country - Private income depends on EU activity in port, and landings - Impact on catches and income of local fleet, if EU vessels exploit the same resources
Competition	<ul style="list-style-type: none"> + EU fleets more competitive against other DWF (without FPA private sector incurs higher costs for social and environmental requirements) 	<ul style="list-style-type: none"> + Potential support for national fleet - Competition may occur between national fleet and EU fleet, EU fleets more technologically advanced
Consumers	<ul style="list-style-type: none"> + Supply of fish to the EU market - Tax payers' money spent on fishing agreements 	<ul style="list-style-type: none"> + Potential increase in fish availability, or decrease in fish price if catches or by-catches are landed locally - Potential reduction in fish availability or increase in prices if FPA has impact on status of stocks consumed locally
Trade	<ul style="list-style-type: none"> + EU fleets can land directly into Europe to supply processing sector 	<ul style="list-style-type: none"> + Increase in exports if able to purchase 'originating' fish for processing from EU

		vessels (if they land locally) + EU agreements usually contribute more to local processing industries (and therefore trade) than Asian agreements – Reduced exports if EU vessels do not land locally and minimal capture of value-added. Exports likely to be lower under FPAs than under joint ventures.
Local economies in specific regions	+ FPA directly supports employment on vessels and in processing sectors in dependent regions (Bretagne, France and Basque country (Galicia) in Spain) + FPAs support use of port facilities in European overseas territories e.g. Las Palmas, Spain.	+ Potentially supports economic activities in coastal areas including ports and processing sectors where local landings occur + Potential increase in purchasing power if employment increases – Incentives for local landings do not always exist – Transshipment levels high

5.2 Social impacts

Positive and negative economic impacts for the EU and coastal states are summarised in Table 5-2.

One of the main social impacts is the potential for employment both for the EU and the coastal state in question. For coastal states, employment numbers will depend on the level of ancillary services (such as port services and a processing sector) which have the potential to employ far more people than the fishery (crew). The level of crew employment will also depend on the activity of the EU fleets, and in some cases EU shipowners will pay forfeits rather than take on local crew. Furthermore, many tuna FPAs do not specify that local (national) seamen must be taken on as crew, but instead 'ACP nationals'. This gives more flexibility to the shipowners because the vessels do not necessarily go into port in every country they fish in, but it also reduces the potential employment benefits for coastal states. Local employment will likely be greater through joint ventures than through FPAs because the locally-based fleet will take on more local crew and is more likely to land locally, contributing more to the local processing and export sectors.

There can also be negative impacts if revenue from the FPA means there is less incentive for the coastal country to develop a national fisheries fleet and if stocks are over-exploited and leave fewer opportunities for national industrial and artisanal fishers, as well as artisanal processors (who are often women). For example, the development of domestic processing alongside the implementation of SPS regulations is likely to marginalise small scale processors, whilst there may be some offsetting gains in formal sector employment (e.g. in larger modern processing facilities).

The revenue from fisheries agreements can have a number of macro-economic benefits, including valuable foreign exchange earnings which can be used for debt repayments, reinvestment in the sector, or invested into priorities identified within local development plans (e.g. education, health, transport). If a local processing and export market develops as a result of the FPA there are also the benefits of balancing trade deficits.

There are complex interactions with food security (as described in Section 9.4.1) which may be improved if local landings are encouraged, or worsened if fish on the local markets

are either at higher prices or lower quality (due to over-exploitation or diversion of stocks to external markets). Local landings may also depress local prices which can have impacts on the incomes of artisanal fishermen and consequently their purchasing power. The artisanal fisheries often represent the poorest groups, and support an extensive local economy so any impacts here will have significant implications for poverty levels. In some cases there may dumping on local markets by EU vessels, for example in West Africa by EU pelagic vessels which may lead to market distortion.

Table 5-2 Potential positive and negative social impacts of FPAs for the EU and developing countries

	European Union	Developing country
Employment	<ul style="list-style-type: none"> + Employment on EU vessels + Employment in EU processing sector - Crew of EU vessels are less likely to be EU nationals 	<ul style="list-style-type: none"> + Employment on EU vessels (most agreements specify crew numbers) + Employment within ports + Employment in own processing sector - Fewer employment opportunities than with joint ventures - New FPAs specify national crew, most specify ACP crew - In some cases processing sector loses out to EU processing sector - FPA can reduce investment into national fishing fleet reducing livelihood options - Potential impact on local fishing livelihoods if FPA affects fish stocks or local landings reduce fish prices - Potential impact on traditional processing (often traditionally by women) if FPA affects stocks or diversion of fish to exports - In some cases EU vessels can pay instead of hiring crew
Standards and rights related to job quality	<ul style="list-style-type: none"> + Employment standards on EU vessels (ILO standards) 	<ul style="list-style-type: none"> + Employment standards on EU vessels (ILO standards) better than on other fleets + Observer employment standards
Poverty	<ul style="list-style-type: none"> + EU processing sector supports jobs in areas where few other employment opportunities exist (e.g. the coastal areas of Galicia and Euskadi in Spain and Bretagne in France) 	<ul style="list-style-type: none"> + Balances trade deficits + Provides foreign exchange + Assists debt re-payment + Potentially supports food security if EU fleets land by-catch or local landings, or increases purchasing power if employment + Can support coastal livelihoods - Potential impacts on fishing and processing livelihoods if FPA affects locally used fish stocks - Potential decrease in food security if FPA leads to reduced stocks, increased fish prices and increased exports - Potentially no support to coastal livelihoods if most fish transhipped outside the country

Equity		<ul style="list-style-type: none"> + Increased employment opportunities can support both men (port based jobs; crew) and women (processing sector) + Joint ventures can promote equity in asset ownership (between EU & developing country) - If little port and processing activity women can lose processing options as fish is transhipped directly out of the country - Role for women in industrial processing may be less than artisanal processing - National fleets can have little support and out of date equipment while EU fleets are supported through public funds - Joint ventures slow to develop in some countries
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5.3 Environmental impacts

Positive and negative environmental impacts are summarised for the EU and the developing country in Table 5-3. The key issue rests on whether the stocks to be exploited have a surplus available or not. Where there is no surplus (stocks are fully or over-exploited), the environmental impacts on the stocks will be great, and fishing under an FPA should not be allowed.

Table 5-3 Potential positive and negative environmental impacts of FPAs for the EU and developing countries

	European Union	Developing country
Natural resource stocks	<ul style="list-style-type: none"> + Reduced pressure on EU natural resource stocks 	<ul style="list-style-type: none"> + Allow coastal state to reap benefits from otherwise under-exploited resources + Agreements limit effort, exclusivity clause restricts total EU effort, limiting impacts on stocks + Agreements not always 100% utilised, minimising impacts + Some agreements allow flexibility to reduce fishing pressure in line with scientific advice + Some agreements allow for biological recovery periods + Joint scientific committee in place to annually review stock status - Impacts of fishing on target stocks - May lead to over-exploitation where stock status is unknown - Fishing possibilities not restricted by fishing power; highly efficient fishing methods can increase fishing power for a given tonnage - Biological recovery periods not always detailed - Exclusivity criteria does not exclude non-EU vessels - Promotion of joint ventures may increase overall fishing effort
Environmental	<ul style="list-style-type: none"> + Reduced pressure on 	<ul style="list-style-type: none"> + Agreements allow for gear and by-catch restrictions,

quality & Biodiversity	EU environment and biodiversity	<p>zoning and recovery periods, which help minimise ecosystem impacts</p> <p>+ EU vessels may be more selective than non-EU vessels</p> <p>– Fishing activities have negative impacts on wider ecosystem and biodiversity</p> <p>– Potentially destructive fishing methods still allowed e.g. trawling</p>
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Fishing also causes impacts on the ecosystem beyond the targeted stocks. The FPAs include a number of measures that can support sustainable environmental management. Improved monitoring and surveillance of fish resources may encourage more sustainable fishing practices. However, increased availability of licences as well as economic price incentives are likely to lead to growth of more intensive systems, which in turn can often have negative outcomes.

5.4 Institutional impacts

Positive and negative environmental impacts are summarised for the EU and the developing country in Table 5-4.

There are potentials for FPAs to improve governance and the institutional framework through support for a national fisheries policy. However, in some cases there may be a low involvement of civil society to ensure that governments are held accountable for the expenditure of these funds. This is improving in countries such as Mauritania and Senegal where the media is calling these issues more into question, but in many countries the negotiations and spend of the resulting funds are not in the public arena. The EU is starting to make ex-ante evaluations available to the coastal country before negotiations, but this does not seem to have always happened equally across the board.

This also applies to support for MCS and other initiatives against IUU fishing. While the FPAs provide some improvements in these areas, again the improvements are not universal or only go part of the way required for an effective system. Some problems that have occurred include delays in catch reporting from EU Member States, problems with VMS reporting from EU vessels and the commitment of the coastal country to running an observer programme. Many of the agreements allow for observers 'on request of the coastal country', but these are sometimes not used due to the cost or difficulty in organising a programme, as is the case in the Seychelles.

There may also be difficulties of the coastal country to hold the EU to account if there is low compliance of the agreement. For example, there are some indications that the EU has not complied with all the provisions in the Kiribati FPA but the government has not taken any action although they are entitled to levy fines. It may be the case that the support given by the EU in an FPA is part of their overall package of support to the country (as suggested in the Mauritanian case study) so that countries feel they need to remain on good terms to retain other benefits. In other cases, the coastal states may not have the resources, or may not effectively implement their systems and processes for arresting or fining vessels that do not comply with regulations.

Table 5-4 Potential positive and negative institutional impacts of FPAs for the EU and developing countries

	European Union	Developing country
Governance	<ul style="list-style-type: none"> + EU vessels regulated under an overarching framework – Difficulties in evaluating the impacts or spend of funds contributed for development and implementation of a fisheries policy – Low levels of transparency on the state of the stock and other agreements 	<ul style="list-style-type: none"> + Financial support for development and implementation of a fisheries policy – Existence of an FPA may not encourage the development of fisheries management, appropriate institutions and maximising resource rent²⁹ – May be pressurised into signing agreement – Potentially low levels of transparency of ex-ante or ex-post evaluations of agreements – Difficulties in holding EU to account if low compliance on agreement
Monitoring, Control & Surveillance	<ul style="list-style-type: none"> + EU vessels report to flag state VMS under FPAs (whereas joint ventures may require local reporting) – EU vessels may be under stricter regulations than they would under private arrangements, or joint ventures (lower social and employment requirements) 	<ul style="list-style-type: none"> + Agreements provide a framework for VMS, observers and restrictions on transshipments. – Lack of information on EU vessel activity – Vessels often do not provide entry/exit notices, vessels report VMS to flag state rather than locally; compounded by delays in catch reporting from EU vessels to coastal state

²⁹ E.g. in Namibia, the decision not to sign an FA with the EU, and in Mozambique the decision not to renew the FA (in 1993), led to the definition of national fisheries policies, improvements in institutional and management capacity, and development of the local fleet through joint ventures, increasing local employment and foreign currency revenues through exports.

5.5 Cost-benefit impact analysis

This section reviews three aspects of the costs and benefits of the agreements:

- Value for money for EU (utilisation rates and real price paid per tonne of tuna);
- Direct benefits to coastal states (compensation/contribution and value per tonne of fish, comparing FAs with FPAs);
- Distribution of benefits between the EU and the coastal state (value for money for coastal states compared with that of the EU).

5.5.1 Value for money for the EU

Strategic value of FPAs

Not all FPA costs and benefits can be expressed in economic terms and value-for-money. There are often political and diplomatic benefits from promoting fisheries relations between states. In some circumstances there are also strategic benefits, for example the bilateral agreements that have been set up in the Pacific: the current agreement with Kiribati has had low utilisation, but the agreements secured a foothold for the EU in the Pacific before effort levels were restricted. With the Solomon Islands and Federated States of Micronesia FPAs, it should become more worthwhile for Spanish purse seiners based in Manta, Ecuador to fish further inside the WCPO area.

Some estimates of the historical costs and benefits of fishing agreements between the EU and third countries are contained in the IFREMER report (1999). This report looks at the costs and benefits to both the EU member state and the coastal state for selected case study countries. It calculated that over the period 1993-1997, every Euro paid by the EU for fisheries agreements with developing countries generated a turnover of €3.1.

Utilisation rates

Average utilisation rates for a range of fisheries agreements are illustrated in Table 5-5. Utilisation rates for tuna agreements specifically are shown in Figure 5-1, and for mixed agreements in Figure 5-2.

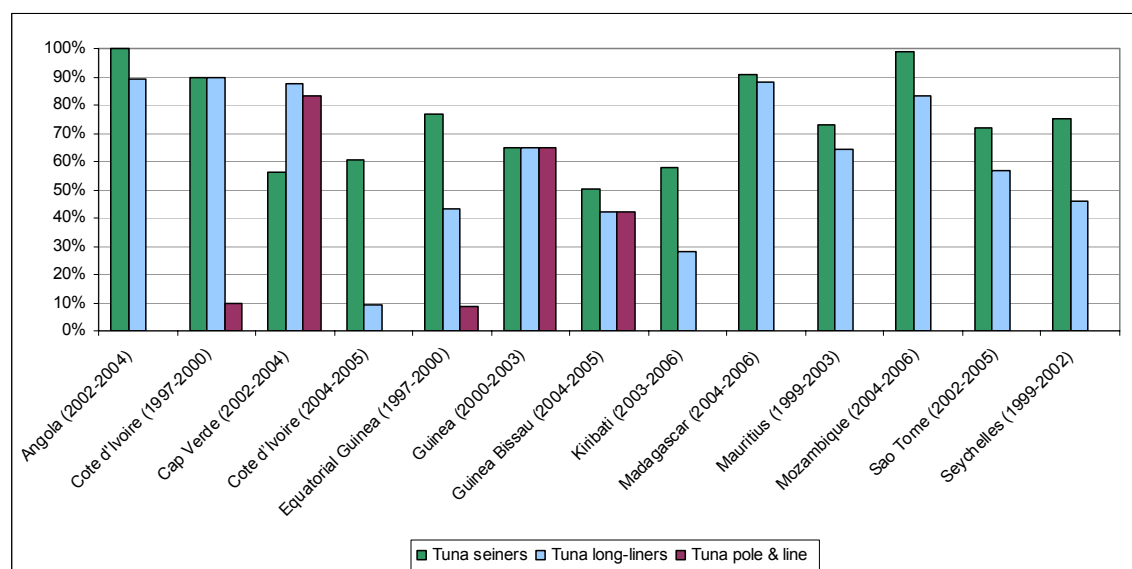
These utilisation rates give an indication of the use of the fishing possibilities over the life-time of the agreement. Two types of utilisation rates are given: take-up of licences and catch rates as a proportion of the reference tonnage for tuna agreements only (utilisation of reference tonnage). For the latter, it is worth noting that the averages hide considerable year to year variation due to the migratory nature of tuna and the changes in their distribution. For example, the average utilisation rate of the reference tonnage for Madagascar is 56.3% reflecting a sharp fall in catches for 2003-2004 of only a few hundred tonnes and a return to 12,000 tonnes in 2005 (against a reference tonnage of 11,000t).

Table 5-5 Average utilisation rates of licences for selected EU fisheries agreements

Country	Date of agreement	Total EU contribution €million/yr	Shrimp	Demersal fisheries	Tuna seiners	Tuna long-liners	Tuna pole & line	Tuna reference tonnage
Angola	2002-2004	15.5	90%	44%	100%	89%	-	*
Cape Verde	2002-2004	0.68	-	-	56%	87.6%	83.3%	23%
Cote d'Ivoire	2004-2005	1.06	-	*	60.5%	9%	0%	44%
Equatorial Guinea	1997-2000	0.32	-	-	77%	43.3%	8.7%	100%
Gabon	1998-2001	0.67	-	-	70%	98%	-	100%+
Guinea	2000-2003	3.33	18.3%	57.3	65%	65%	65%	*
Guinea Bissau	2004-2005	7.26	72%	27%	50.5%	42%	42%	*
Kiribati	2003-2006	0.416	-	-	58%	28%	-	8.5%
Madagascar	2004-2006	0.825	-	-	91%	88%	-	56.3%
Mauritius	1999-2003	0.41	-	-	73%	64.5%	-	56.4%
Mozambique	2004-2006	0.6	0%	-	99%	83%	-	150%
Sao Tome	2002-2005	0.637	-	-	72%	57%	0%	58%
Seychelles	1999-2002	3.46	-	-	75%	46%	-	48%
Seychelles	2002-2005*	3.46	-	-	-	-	-	123%

*Based on data from 2002 and 2003 only

Source: Proposed Council Regulations and ex-post evaluations

**Figure 5-1 Average licence utilisation rates for EU tuna agreements**

Utilisation of purse seine licences are relatively high, ranging from 55% to 100% (average 74%). Use of tuna long-line licences can be lower and ranges from 10% to 90% (average 59%). Pole and line vessels can also have a relatively low utilisation where they exist, on average only 26%. For example there was 0% utilisation of these licences during 2004 and 2005 in Cote d'Ivoire, and during 2002-2005 in Sao Tome. For non-tuna fishing possibilities use of both shrimp and demersal fisheries licences have varied.

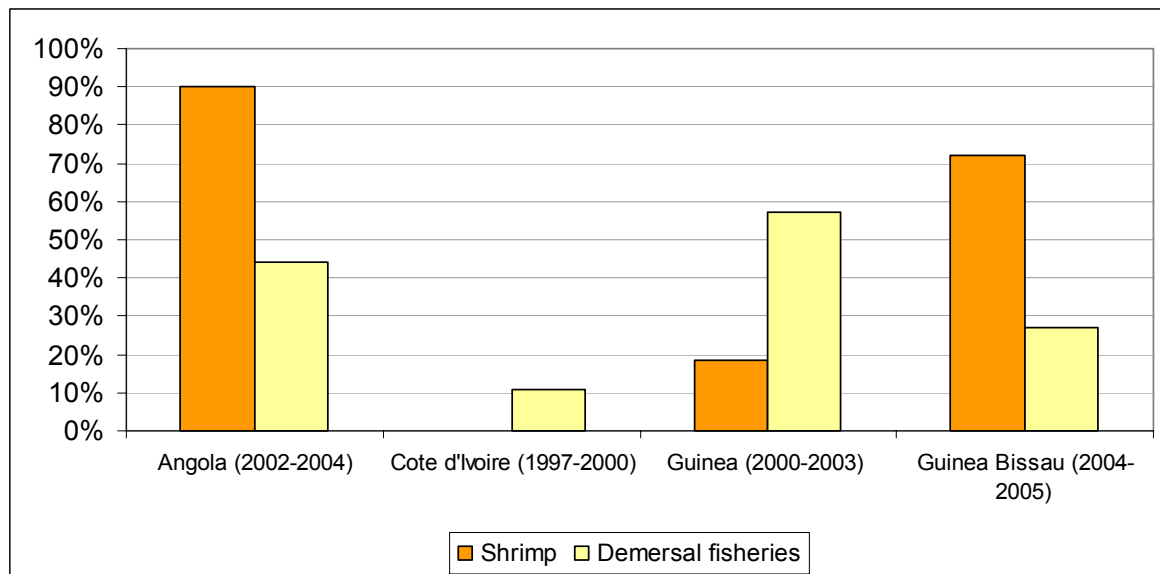


Figure 5-2 Average licence utilisation rates for non-tuna species for selected agreements

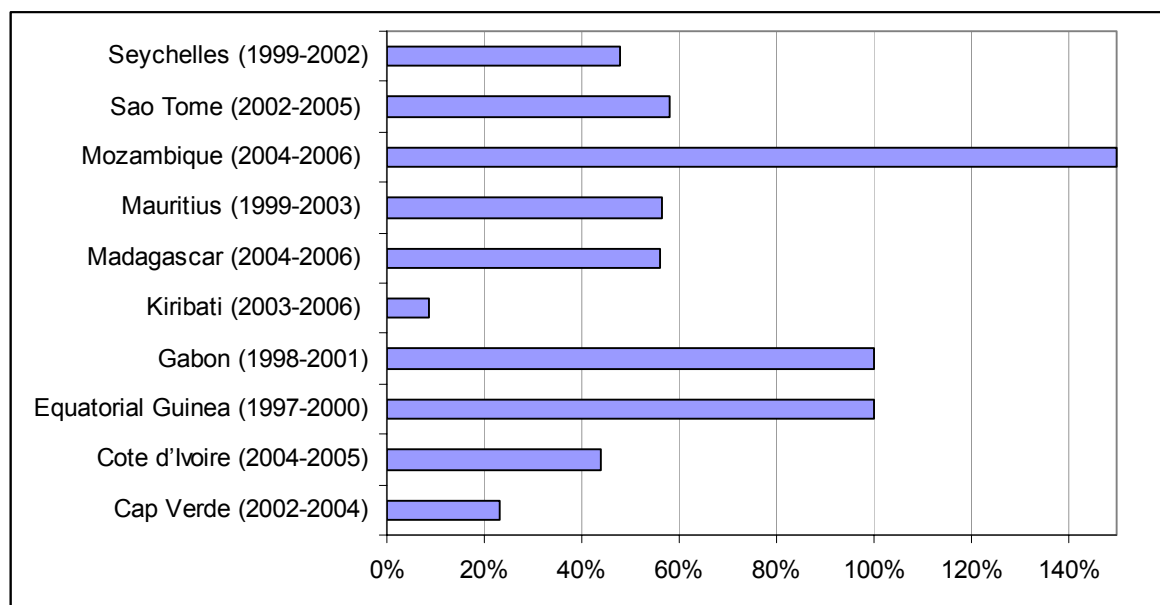


Figure 5-3 Average utilisation rates of tuna reference tonnage

The average utilisation rates illustrated in Figure 5-3 show how in general it is rare for the reference tonnage to be exceeded. This was the case in Mozambique for the 2004-2006 agreement, due to unusually high catches in 2004. 100% utilisation was also achieved in Gabon (1998-2001) and Equatorial Guinea (1997-2000). However, the majority of other agreements have had lower reference tonnage utilisation rates of below 60%.

It must be remembered that tuna catches are highly variable and difficult to predict due to the migratory nature of tuna. Despite this, given the low rate of utilisation of the reference tonnage, it appears the EU may be over-paying for tuna fishing opportunities.

Costs of non-utilisation

Using the licence and reference utilisation rates it is possible to give an indication of the 'value for money' of the agreements, by looking at the number of licences that were not taken up, and the real cost of each tonne of tuna based on actual catches taken. These calculations are summarised in Table 5-6.

Table 5-6 Comparison of the utilisation of the tuna reference tonnage and the corresponding costs of the unused licences and tonnage

Country	Date	EU financial contribution for tuna (€year)	No. licences			Actual cost per tonne of tuna €/tonne	Estimated annual cost of tuna licences not taken up (total) ⁽¹⁾	Source
			Vessel type	Opportunities	Unused (average)			
Cape Verde	2002-2004	400,000	Seiners	37	16.3	328	€201,333	Proposed council regulation for 2006-2011 agreement
			Long-liners	62	7.7			
			Pole and Line	18	3.0			
Côte d'Ivoire	2004-2005	675,000	Seiners	34	13	169	€388,023	Ex-post evaluation 2004-5
			Long-liners	11	10			
			Pole and Line	3	3			
Equatorial Guinea	1997-2000	620,000	Seiners	30	7	80	€115,858	Proposed council regulation for 2000-2001 agreement
			Long-liners	30	17			
			Pole and Line	8	7			
Gabon	1998-2001	670,000	Seiners	42	13	74	€252,976	Proposed council regulation for 2001-2005 agreement
			Long-liners	33	20			
Kiribati	2003-2006	416,000	Seiners	4	2	769	€219,556	Proposed council regulation
			Long-liners	12	8			
Madagascar	2004-2006	825,000	Seiners	40	4	159	€75,494	Proposed council regulation
			Long-liners	40	5			
Mauritius	1999-2003	410,000	Seiners	43	12	132	€126,034	Proposed council regulation and ex-post evaluation
			Long-liners	40	14			
Mozambique	2004-2006	600,000	Seiners	35	0	75	€19,048	Ex-post evaluation 2004-2006
			Long-Liners	14	2			
São Tomé & Príncipe	2002-2005	637,500	Seiners	36	10	128	€251,258	Proposed council regulation for 2005-2006 extension
			Long-liners	25	11			
			Pole and Line	2	2			
Seychelles	1999-2002	3,460,000	Seiners	40	10	157	€1,002,106	Proposed council regulation for 2002-2005 agreement
			Long-liners	27	15			

(1) The method for calculating this has been to weight the division of the contribution between the tuna vessels based on the tonnage expressed within the advance licence fees.

*Information missing

It illustrates that for the majority of tuna agreements there are a number of fishing possibilities (licences) that are not taken up. The estimated costs of the licences that are not used range from €19,048 to €1,002,106 and in this particular range of agreements reviewed below amounts to a total of €2.6 million per year. However, due to the lower contribution paid for tuna than for mixed agreements, it is likely that these opportunity costs for tuna agreements are also considerably lower than those within mixed agreements. The ex-post evaluation of the Angolan agreement the estimated annual cost of fishing possibilities not taken up was estimated to be €5.9 million (out of an annual contribution of €15.5 million). These data are for the fisheries agreements, rather than the FPAs, and will be a useful baseline to evaluate the FPAs against once there are a few years' experience of implementation of the FPAs.

Value of fish from FPAs

Another way of illustrating this is by looking at the real costs of a tonne of tuna to the EU, compared to its market value. In general the EU pays € 65–75 per tonne of tuna (with the balance to total € 100 per tonne paid by the shipowners). Owing to the low utilisation of the reference tonnage in some agreements the EU can end up paying anything from € 128 up to € 769 per tonne. Nevertheless, in all cases, this is still less than the cost of buying the tuna on the world market (approximately € 770 per tonne) in order to supply EU processing factories.

EU taxpayers

An approximate view of the costs and benefits to the EU taxpayer as a return on the use of public monies is indicated in terms of the value of the raw material compared to the outlay on the FPAs and the prices on world markets. In a sense this is the real value for money since many of the direct and indirect value-added derived from processing would be gained whether the fish was taken by the EU fleet or purchased on the open market. From our best estimate obtained from 2004, the outlay by the Commission on agreements was € 143.7 million, which purchased access to fishing for 462,000 tonnes of fish. This amounts to € 311 per tonne. Since average tuna prices over the period (Fig 3–1) are some € 770 per tonne, this looks like very good value for money, particularly since much of the non-tuna catch is high value demersals and shrimp. However, a large amount of this (some 340,000 tonnes of fish) was for small pelagics, which have a lower market value.

Table 5-7 Estimated catches and their value from FAs, 2004

Country	Tuna (t)	Other (t)	Total catch (t)
Angola	6,000	2,000	8,000
Cape Verde	20,094		20,094
Comores	1,279.7		1,279.7
Cote d'Ivoire	4,962	0	4,962
Gabon	11,693		11,693
Guinea Bissau	427.07		427.07
Guinea Conakry	3,332	1,050	4,382
Kiribati	624		624
Madagascar	363.4		363.4
Mauritania	11,301	8,699	20,000
Mauritius	71.2		71.2
Mozambique	12,060	0	12,060
São Tomé	3,710		3,710
Senegal	5,689		5,689
Seychelles	67,061		67,061
TOTAL (t)	130,667.4	11,749	152,244.4
Market value (€ per tonne)	850	3,000	
Total market value (€)	111,067,265	35,247,000	
Total value (€)			146,314,264
Value per tonne			€961 per tonne

To consider real value-for-money, it is necessary to consider the price paid per tonne of fish that was actually caught. The best estimate we can obtain on the actual amount of fish caught in 2004 under the agreements was 152,244 tonnes (Table 5-7), based on EU reported catches of tuna and estimates of non-tuna catches. This gives an actual cost to the EU of € 944 per tonne, surprisingly close to the estimated market value of the catch, of €961 per tonne. However, the market price of tuna (estimated here at €850 per tonne) will affect this value. If a higher market price of tuna is considered (e.g. €1,000 per tonne), then the market value of the catch would be nearer €1,090 per tonne (Table 5-8). Nevertheless, by comparison this looks like a much more marginal benefit compared to buying on the world market, than the €100 per tonne that is budgeted, but there is the additional benefit of maintaining employment on the EU fleet. However, the potential market value of this fish

may be much higher, and a more in-depth analysis of the value of fish from FAs and FPAs would allow a more accurate evaluation of these costs and benefits. Trade data from Eurostat indicate that the EU pays on average € 2,957 per tonne of fish imported from these same countries (320,965 tonnes of fish valued at € 949 million in 2004) (Eurostat).

Table 5-8 Comparison of price paid with market value of fish from FPAs

	Cost or value (€)	Tonnage of fish (t)	Price per tonne
Reference tonnage	€ 143.7 million	462,000	€ 311
Catch from FPAs	€ 143.7 million	152,244	€ 944
Market value of fish	€ 146.3 – 166 million	152,244	€ 961–1,090

Value to FPA countries

The value of fish obtained from FPAs is equal to 18–21% of the value of net exports of fish and fish products from the FPA countries to the EU. The value of net exports of fish and fish products from FPA countries to the EU in 2004 was € 797.8 million, whilst the value of fish obtained through FPAs from these same countries was € 146.3 million. Whilst the FPA countries recoup most of this € 146–166 million through the financial contributions for FPAs, they may be losing much greater sums through lost value-added processing opportunities.

5.5.2 Comparison of direct benefits to coastal states

The direct benefits received by coastal states from fisheries agreements stem from the financial contribution payments received in return for fishing opportunities. These payments are dependable, unlike the possible revenue that may accrue from shipowner licence fees, port taxes etc.

Table 5-9 shows the financial contribution and fishing opportunities under the most recent FA and the current FPA for those countries with FPAs; the same information is summarised in Table 5-10. The value of the agreement to the coastal state, per fishing opportunity (per tonne of tuna, or per vessel or GT for mixed agreements) is calculated to give an indication of whether the coastal states are receiving more or less per fishing opportunity than they were under the FAs. In the case of tuna, usually a reference tonnage is given in the agreements and the value per tonne can clearly be calculated. For mixed agreements (Mauritania and Morocco) where the fishing opportunities are based on both number of vessels for some species, and gross tonnage for other species, this is more complicated. A rough estimate of the value per vessel is calculated, based on the approximate number of vessels allowed to fish under the agreement.

The financial contribution of the majority of the agreements has decreased between the FAs and the FPAs. São Tomé & Príncipe showed only a small reduction; others showed a more dramatic decrease of 30% or more (Mozambique, Morocco, Mauritania, Gabon, Cape Verde). This occurred when the FA was for a mixed agreement, but the fishing opportunities had been reduced in the FPA. In the case of Cape Verde, Gabon and Mozambique, the opportunities for bottom longliners, crustaceans and prawns, respectively, were not renewed under the FPAs. Instead the FPAs focus only on tuna. This is because, in some cases (e.g. Mozambique) there was no interest in the non-tuna opportunities from EU shipowners, or the status of the demersal stocks is not well known or there was no interest from Member States. Since the non-tuna opportunities attract considerably higher financial contribution payments (due to the resources being demersal and therefore more likely to be encountered only within the EEZ, unlike tuna which is migratory), the removal of these opportunities resulted in a large decrease in financial contribution.

The amount received by the coastal states, per fishing opportunity, was fairly consistent between the FAs and the FPAs. In Morocco, the financial compensation per vessel under the FA was approximately € 250,000, and under the FPA was approximately € 260,000. There was a greater time delay between the FA and the FPA in Morocco than in other countries, with a hiatus between 1999 and 2006 when there was no agreement. In Mauritania, financial contribution has decreased from approximately € 478,000 per vessel to € 430,000 per vessel. This is probably due to reduced opportunities for shrimp and octopus under the FPA, and increased opportunities for small pelagics, which are lower-value resources.

The compensation that coastal states receive for tuna has remained fairly constant between the FAs and the FPAs, at € 100 per tonne. The responsibility for payment has shifted slightly more onto the shipowners, who pay € 35 of the € 100 under the FPAs compared to € 25 under the FAs. The reduction of the Community part of the contribution means that the guaranteed financial contribution payment that states receive decreases under FPAs. The extra payment for 'supporting fisheries policy' in the FPAs in some cases helps compensate for this reduction.

Table 5-9 Compensation/contribution payments and fishing opportunities for recent FAs and current FPAs

Note: contribution per tonne in italics indicates the price paid by the EU taking into account the contribution for fisheries policy.

		FA	FPA	Increase/ decrease	Comments
Cape Verde	FC (€m)	0.68	0.385	↓	FPA includes €60,000 for fisheries policy
	Fishing opportunities	Tuna 7,000 t Bottom LL: 630 GRT/ month	Tuna 5,000 t	↓	Reduction in contribution under FPA due to loss of bottom longliners.
	EC contribution per tonne or vessel	Tuna €75/tonne Bottom LL €246/GRT	Tuna €65/tonne <i>But effectively €77/tonne</i>	↓ / ↑	<i>Taking into account payment for fisheries policy</i>
	FC + shipowner payments /t	€100/tonne	€100/tonne <i>But effectively €112/tonne</i>	→ / ↑	
Comoros	FC (€m)	0.35	0.39	↑	
	Fishing opportunities	Tuna 4,670 t	Tuna 6,000 t	↑	
	EC contribution per tonne or vessel	Tuna €75/tonne	Tuna €65/tonne	↓	
	FC + shipowner payments /t	€100/tonne	€100/tonne	→	
Cote d'Ivoire	FC (€m)	1.065	0.595	↓	FPA includes €140,000 for fisheries policy
	Fishing opportunities	Tuna 9,000 t Demersal trawlers 1,300 GRT/month	Tuna: 7,000 t	↓	Reduction in contribution due to reduced tuna reference tonnage and loss of demersal opportunities
	EC contribution per tonne or vessel	Tuna: €75/tonne Demersal: €300/GRT	Tuna: € 65/tonne <i>But effectively €85/tonne</i>	↓ / ↑	<i>Taking into account payment for fisheries policy</i>
	FC + shipowner payments /t	€100/tonne	€100 / tonne <i>But effectively €120/tonne</i>	→ / ↑	<i>Taking into account payment for fisheries policy and shipowner contributions</i>
Gabon	FC (€m)	1.263	0.86	↓	Reduction in contribution due to loss of crustacean opportunities
	Fishing opportunities	Tuna 10,500 t Crustaceans 1,200 GRT	Tuna 11,000 t	Tuna: ↑ Other: ↓	Number of tuna vessels has decreased but ref tonnage increased
	EC contribution per tonne or vessel	Tuna €75/tonne Crustaceans €396/GRT	Tuna €65/tonne <i>But effectively €78/tonne</i>	↓ / ↑	
	FC + shipowner payments /t	€100/tonne	€100/tonne <i>But effectively €113/tonne</i>	→ / ↑	

Guinea-Bissau	FC (€m)	7.26	7	↓	FA figures for 2004 revision of the protocol
	Fishing opportunities	Tuna: 40 PS & 36 LL/P&L Shrimp: 4,400 GRT/yr Fish/cephalopds: 4,400 GRT/yr	Tuna: 23 PS/LL; 14 P&L Shrimp: 4,400 GT/yr Fish/cephalopds: 4,400 GT/yr	↓	Number of tuna vessels has decreased
	EC contribution per tonne or vessel				Not possible to separate out financial contribution between tuna vessels and GT for shrimp, fish and cephalopods
	FC + shipowner payments /t				
Kiribati	FC (€m)	Yr 1: 0.55 Yr 2&3: 0.416 (average: 0.46)	0.478	↑	FPA includes €62,400 for fisheries policy
	Fishing opportunities	Tuna average: 7,067 t Yr 1: 8,400 t Yr2/3: 6,400 t	Tuna 6,400 t	↓	
	EC contribution per tonne or vessel	€65/tonne	€65/tonne <i>But effectively €75/tonne</i>	→ / ↑	
	FC + shipowner payments /t	€100/tonne	€100/tonne <i>But effectively €110/tonne</i>	→ / ↑	
Madagascar	FC (€m)	0.825	0.99	↑	FPA includes €0.275m for fisheries policy
	Fishing opportunities	Tuna 11,000 t	Tuna 11,000 t	→	
	EC contribution per tonne or vessel	€75/tonne	€65/tonne <i>But effectively €90/tonne</i>	↓ / ↑	
	FC + shipowner payments /t	€100/tonne	€100/tonne <i>But effectively €125/tonne</i>	→ / ↑	
Mauritania	FC (€m)	86	86	→	
	Fishing opportunities	Tuna 67 vessels Demersal 16,800 GT Crustacean: 6,200 GRT/yr Cephalopods: 55 Pelagics: 15 freezer trawlers (c. 180 vessels)	Tuna 67 vessels Demersal 6,674 GT Crustacean: 10,040 GT/yr Cephalopods: 43 Pelagics: 22 freezer trawlers + 15,000GT non-freezer) (c. 200 vessels)	→	Opportunities between FA and FPA not clear due to switch from GRT to GT. FPA reduced number of cephalopod vessels, increased number of pelagic vessels.
	EC contribution per tonne or vessel	Approx €478,000/vessel	Approx. €430,000/vessel	↓	
Morocco	FC (€m)	125	36.1	↓	
	Fishing opportunities	Tuna 27 vessels Shrimp: 150→113 GRT Demersal trawlers: 50 Bottom LL: 174→140 Pelagics: 83 small-scale seiners + 12 industrial Cephalopods: 128→68 (c. 500 vessels)	Tuna 27 vessels Shrimp: 0 Demersal trawlers: 22 Bottom LL: 50 Pelagics: 20 small-scale vessels + 18 industrial Cephalopods: 0 (137 vessels)	↓	Opportunities have been decreased. Shrimp and cephalopods removed
	FC contribution per tonne/vessel	Approx €250,000/vessel	Approx €263,500/vessel	↑	
Mozambique	FC (€m)	4.09	0.9	↓	FPA includes €0.25m for fisheries policy.
	Fishing opportunities	Tuna 8,000 t Deep-water prawn: 1,000 t	Tuna 10,000 t	Tuna: ↑ Other: ↓	
	EC contribution per tonne/vessel	Tuna €75/tonne Prawn €3,490/tonne	Tuna €65/tonne <i>But effectively €90/tonne</i>	↓ / ↑	
	FC + shipowner payments /t	€100/tonne	€100/tonne <i>But effectively €125/tonne</i>	→ / ↑	
São	FC (€m)	Yr 1: 0.975 Yr 2&3: 0.638 (average 0.75)	0.663	↓	FPA includes €110,500 for fisheries policy.
	Fishing opportunities	Tuna 8,500 t Crustaceans: 3 vessels (yr1)	Tuna 8,500 t	Tuna: → Other: ↓	

	EC contribution per tonne/vessel	Tuna €75/tonne Crustaceans €112,500/vessel	Tuna €65/tonne <i>But effectively €78/tonne</i>	↓ / ↑	
	FC + shipowner payments /t	€100/tonne	€100/tonne <i>But effectively €113/tonne</i>	→ / ↑	
Seychelles	FC (€m)	3.46	4.125	↑	Increase due to increase in reference tonnage
	Fishing opportunities	Tuna 46,000 t	Tuna 55,000 t	↑	
	EC contribution per tonne/vessel	€75/tonne	€75/tonne	→	FPA protocol was agreed under the previous FA (2005)
	FC + shipowner payments /t	€100/tonne	€100/tonne	→	

FC = financial compensation/contribution

- ↑ Increased
 ↓ Decreased
 → Stayed the same
 → / ↑ Stayed the same but effectively increased (due to payment for fisheries policy)
 ↓ / ↑ Decreased but effectively increased (due to payment for fisheries policy)

Table 5-10 Summary of changes between FAs and FPAs in financial contribution, fishing opportunities, and financial contribution per tonne

			Financial contribution per tonne			
			Excluding payment for fisheries policy		Including payment for fisheries policy	
			EC contribution per tonne	Total compensation per tonne	EC contribution per tonne ¹	Total compensation per tonne
Cape Verde	↓	↓	↓	→	↑	↑
Comoros	↑	↑	↓	→	↓	→
Côte d'Ivoire	↓	↓	↓	→	↑	↑
Gabon	↓	↓	↓	→	↑	↑
Guinea-Bissau	↓	↓				
Kiribati	↑	↓	→	→	↑	↑
Madagascar	↑	→	↓	→	↑	↑
Mauritania	→	~ →	↓		↓	
Morocco	↓	↓	↑		↑	
Mozambique	↓	↓	↓	→	↑	↑
São Tomé & Príncipe	↓	↓	↓	→	↑	↑
Seychelles	↑	↑	→	→	→	→

1 Calculation of EC contribution 'per tonne' is based on the contribution per vessel for Morocco and Mauritania

- Increased
 ■ Stayed the same
 ■ Decreased

Table 5-11 Contribution received by coastal states per tonne of tuna under their previous FA and the current FPA (€ per tonne) – tuna agreements only

Country	FA			FPA				
	Shipowners (€ per tonne)	EC (€ per tonne)	Total (EC + shipowners) (€ per tonne)	Value per tonne based on contribution for fishing opportunities			Value per tonne inc. EC contribution for fisheries policy	
				Shipowners (€ per tonne)	EC (€ per tonne)	Total (EC + shipowners) (€ per tonne)	EC (€ per tonne)	Total (EC + shipowners) (€ per tonne)
Cape Verde	25	75	100	35	65	100	77	112
Comoros	25	75	100	35	65	100	65	100
Côte d'Ivoire	25	75	100	35	65	100	85	120
Gabon	25	75	100	35	65	100	78	113
Kiribati	35	65	100	35	65	100	75	110
Madagascar	25	75	100	35	65	100	90	125
Micronesia	–	–	–	35	65	100	65	100
Mozambique	25	75	100	35	65	100	90	125
São Tomé & Príncipe	25	75	100	35	65	100	78	113
Seychelles	25	75	100	25	75	100	75	100
Seychelles (revised)	25	75	100	35	65	100	85	120
Solomon Islands	–	–	–	35	65	100	65	100

N.b. shading indicates the FPAs do not include an extra payment for supporting fisheries policy (negotiated before the Council Conclusions)

The extra payment made by the Community for supporting fisheries policy in some FPAs effectively increases the Community contribution from € 65 per tonne of tuna to € 75–90 per tonne (average € 82) — the same or higher than it was under the FAs — or a total contribution of €110–125 per tonne (Community plus shipowner contributions) (Table 5-11). Mozambique and Madagascar receive relatively more, €90 per tonne from the Community, and a total of €125 per tonne including shipowner contributions. The mixed agreements do not include this extra payment for supporting fisheries policy, perhaps because the high value of the financial contribution already provides adequate funding for implementing actions in the fisheries sector. All the tuna agreements do include it, except for those negotiated before the Council Conclusions (Seychelles, Comoros, Micronesia and Solomon Islands).

5.5.3 Distribution of the benefits from fishing agreements

The distribution of costs and benefits of fishing agreements between the EU and the coastal state provides an indication of their fairness. For coastal states, the revenue from added-value activities, such as employment, processing and port services, is greater than the direct financial contribution payments. This puts countries that are unable to capture these value-added benefits at a particular disadvantage. Despite this, approximately 10% of the employment and value-added from fisheries agreements goes to the host country, with the remainder flowing to the distant water fishing nation (Mwikya, 2006).

The political economy issues include:

- Which country obtains which economic and social benefits from the FAs and FPAs?

- Are there ways in which the value-added and economic rent from the fisheries in an ACP country's EEZ could be increased and/or maximised to the benefit of the ACP country³⁰?
- To what extent do FPAs/FAs bring other benefits in terms of revenue generation for third countries?

In considering these questions, we draw from the economic analyses within those ex-post evaluations that estimate the benefits of the fishing agreements for the coastal state in question, and then look at detailed data available for Seychelles, Senegal, Mauritius, Côte d'Ivoire and Mozambique. Information on costs and benefits can be obtained by looking at information on the benefits accrued by the coastal state, and the potential benefits to the EU based on estimates of catch records and the value of this catch. These estimates are indicative only and would require a rigorous analysis of data from DG Fisheries in terms of catch rates, as well as collection of cost data from coastal states, to work up a complete cost-benefit analysis.

Comparison across a range of countries

Table 5-12 illustrates some of the benefits that have been evaluated within the EU ex-post evaluations. It is worth noting that the benefits to the EU have been more comprehensively covered by the evaluations, whereas the costs and benefits to the coastal state are often not considered.

Some countries have been able to extract significant added-value from the agreements, through processing and export industries. In the Indian Ocean, Seychelles is a good example of this as the majority of the EU catch landed in the Indian Ocean is through Port Victoria (Table 5-13). By contrast there are few landings or EU fleet activity in the ports of Mauritius or Mozambique and as a result these countries glean little additional benefits in terms of employment or added value. In the Atlantic Ocean, Côte d'Ivoire has been able to capture additional value through processing, although the civil unrest in recent years may have reduced activity in the port of Abidjan.

The agreement with Mauritania the highest value FPA, yet there are virtually no landings by EU fishing vessels in Mauritania and very little processing activity. Mauritania only undertakes primary processing of cephalopods and other catches which are landed mainly by the motorised small-scale and national industrial fishing fleet based near Nouakchott and at Nouadhibou. The octopus fishery produces more added-value benefits for Mauritania than those associated with the EU fishing agreement. The level of value-added, and in many cases the downstream employment, has not been calculated for a number of other countries in the region within the ex-post or ex-ante evaluations (e.g. Morocco, Gabon, Cape Verde).

³⁰ Anecdotal sources within FAO and the World Bank suggest that in many cases, the value added/rent extraction by the coastal state having a fishing agreement is relatively low. One estimate is that rent extraction by ACP countries may be as low as 25% of potential economic rent, while in a country like Namibia which has no fishing agreements, rent extraction may be as high as 60%.

Table 5-12 Estimated benefits to the EU and the coastal state

Country	Date of agreement	Estimated benefits to the EU				Estimated benefits to Coastal State		
		Added value (€million/year)		Direct employment (no jobs)	Upstream/Downstream employment (no jobs)	Added value (€million/year)	Direct employment (no jobs)	Upstream/Downstream employment (no jobs)
		Vessel benefits	Downstream					
Angola	2002-2004	27.0 (total added value) *		245	600		*	*
Cape Verde	2002-2004	*	*	*	*	*	*	*
Cote d'Ivoire	2004-2005	1.3 (gross); 0.8 (net)	*	206	220	17	150-200	1,300
Comoros	2001-2004	€5.70 for every €1 invested	*	*	*	*	*	*
Equatorial Guinea	1997-2001	*	*	*	*	*	*	*
Gabon	1998-2001	*	*	*	*	*	*	*
Guinea	2000-2003	8.8 (Gross)	6.3	€15 million/year			1.4	*
Guinea-Bissau	2004-2006	Value added/turnover ratio: Shrimp: 9%; Finfish/Cephalopods: 8%; Tuna seiners: 8%; Pole & line and long-liners: 33%				*	*	*
Kiribati		*	*	36	*	*		*
Madagascar	2004-2006	4.8 (2005) [negative for 2004] *		1100		2.2 direct 5.4 downstream	0	*
Mauritania	2001-2006	150	*	800-950	2600-3100	*	*	*
Mauritius	2003-2007	0.9	0.121	4		*	13 (ACP crew)	*
Mozambique	2004-2006	4.5	1.1	14	*	*	0 Moz (24 ACP crew)	*
Morocco	2005-2011	131.5 (vessel turnover for pelagic, demersal & small-scale) 66 (gross value)*		678	1551	*	*	*
Seychelles	2002-2005	*	*	332		27-30 (includes compensation)	1,900	

Source: Proposed council regulations and ex-ante and ex-post evaluations

Note: Countries in **bold** indicate where the data are based on the full ex-ante/ex-post evaluation. For the other countries, the data are based on information from the executive summaries of the evaluations, or summaries included in the proposed council regulations.

Note: * = missing information

Seychelles

Seychelles is an exclusively tuna agreement and receives one of the highest financial contributions for access to tuna resources in an EEZ, based on a high reference tonnage. It also has a highly developed tuna processing industry and the majority of the EU catches are landed and processed within the Seychelles. Port Victoria has become a significant base for Spanish and French purse seiners.

Estimates for the costs and benefits attributable to the EU and Seychelles for one year of the agreement (2004) are illustrated below (Table 5-13). Caution should be placed on these estimates as certain figures, including vessel operating costs, VMS/MCS costs and the value-added from tuna processing in-country, are based on estimates.

Table 5-13 Indicative annual costs and benefits for Seychelles (for 2004)

	Value (€)	Assumptions
Benefits to Seychelles' Economy		
Financial compensation	3,460,000	Annual compensation for agreement 2002-2005
Estimated licence fees from EU vessels	350,500	Based on the average licences taken up in 2002 & 2003 (from the ex-post evaluation) and a purse seine licence cost of €10,000 and average longline licence cost of €1,750.
Value-added from tuna processing	45,600,000	Estimated as a third of the total value of \$200,000,000. Other informal estimates have been 25% of this value.
Estimated net spend of EU vessels	26,303,030	Estimated as value-added equalling to 1.6 times of annual vessel spend and accounting for 65% leakage from the economy.
<i>Total benefits of those listed to economy</i>	<i>74,497,530</i>	The ex-ante evaluation calculates this as €27-30million.
Costs to the Economy		
MCS/VMS	No estimates	
Fisheries management	"	
Port infrastructure	"	
Benefits to EU		
Declared catches of tuna	66,000 t	ICCAT recorded data of EU catches in Seychelles EEZ of Yellowfin, Big-eye and Skipjack in Seychelles' EEZ
International price for tuna	770	Average price for purse seine tuna per tonne
Total value of tuna	50,820,000	
By-catches	6,600 t	Estimated as 10% of total catch
Price/tonne of by-catch	140	Estimated average price/tonne of by-catch
Value of by-catch	924,000	
<i>Total benefits of those listed to EU vessels</i>	<i>51,744,000</i>	
Costs to EU vessels		
Estimated operating costs including licence fee	15,246,000	Estimated as 1/3 of value of catch
<i>Total costs to EU vessels</i>	<i>15,246,000</i>	
<i>Net Benefits to EU vessels (not accounting for compensation)</i>	<i>36,498,000</i>	

Mauritania

By comparison, Mauritania is a mixed agreement (cephalopods, demersal, small pelagic, crustacean and tuna species). It is also a very high value agreement. While the annual value of financial contribution and licence fees is considerably more than received in the Seychelles, there is virtually no port expenditure by EU vessels, including fishing, reefer and supply vessels and therefore no significant expenditure or employment multiplier effects within the economy.

In contrast to Senegal, Morocco, Seychelles and other Pacific countries, Mauritania has not been able to develop a fish processing and other sectors based on landings, transshipment and port activities by EU fishing fleets. The existing fish processing industries depend on the local industrial fishing fleet, which consists mainly of old Chinese vessels bought under joint venture companies, some leased vessels and the semi-industrial and small-scale fleets.

This estimate of the costs and benefits of the FA with Mauritania suggests a net benefit ratio of 1.3 in favour of the EU. However it should be emphasised that catch values are based on average prices. In addition some data is missing, such as payments to Mauritanian crew. As with all calculations of the costs and benefits of fishing agreements, an important issue is the degree to which economic benefits and value added are transferred outside the country. In the case of Mauritania, the fact that many of the EU and other fishing vessels land in Las Palmas for transshipment and further processing means that there are benefits for port, shipping, ship chandlery and processing in Las Palmas and other Spanish ports. In the case of octopus, Japanese supply chains and restaurants also benefit, as for non-EU countries, Japan is the biggest importer of octopus from the EU (worth € 18.9 million in 2006) (Eurostat).

Table 5-14 Indicative annual costs and benefits for Mauritania (2004)

	Value (€)	Assumptions
Benefits to Mauritania's Economy		
Financial compensation	86,000,000	Annual compensation for agreement 2002-2005
Estimated licence fees from EU vessels	8,363,000	Based on the average licences taken up in 2004
Value-added from fish processing		No value added from fish landed by EU vessels
Port revenue linked to the fishing agreement	20,000	
Shipping agency and other services	1,390,000	
<i>Total benefits of those listed to economy</i>	<i>95,773,000</i>	
Costs to the Economy		
MCS/VMS	800,000 – 1,000,000	
Fisheries management	Not available	
Port infrastructure	"	
Benefits to EU		
Declared catches of Crustacea, except spiny lobster (3,580 t @ €3,000/t)	10,740,000	Inconsistency between DSPCM and EU declared catch data,
Cephalopods (17,444 tonnes @ €4050/tonne)	70,648,200	
Pelagic species (196,711 tonnes @ €486/tonne)	95,601,546	
Tuna (7,103 tonnes @ €770/tonne)	5,469,310	
Hake (7,496 tonnes @ €800/tonne)	5,996,800	
By-catches (19,671 tonnes @ €140/tonne)	2,753,940	Estimated as 10% of total catch
<i>Total benefits of those listed to EU vessels</i>	<i>191,209,796</i>	<i>190,002,286</i>
Costs to EU vessels		
Estimated operating costs including licence fee	62,700,750	Estimated as 1/3 of value of catch
<i>Total costs to EU vessels</i>	<i>62,700,750</i>	
<i>Net Benefits to EU vessels (not accounting for compensation)</i>	<i>128,509,046</i>	

Mauritius

Mauritius signed a new fisheries agreement for 2003-2007. An evaluation was conducted for the previous agreement (1999-2003) and provides indications on a range of costs and benefits (Table 5-15). The evaluation also contains information on costs and benefits for the years 2004 and 2005 of the new protocol (Table 5-16).

Table 5-15 Selected costs and benefits for the previous EU–Mauritius fisheries agreement (based on 2000-2003 data)

Item	EU		Mauritius		Comments
	Benefits	Costs	Benefits	Costs	
Financial compensation (€)		€410,000	€410,000		
Licences fees (€)		€87,872	€87,872		Utilisation of the licences for this agreement were on average (between 2000 and 2003): Tuna vessels: 73% of purse seine vessels out of 42; 64% of long-liners out of 40 allowed; and around 50% of pole and line vessels.
Annual catches (tonnes)	3,103 tonnes				Average tonnage between 2000 & 2004
Estimated value (€) of catches (based on €770/tonne)	2,389,310				Does not include variable costs for long-line or other tuna species

Source: Oceanic Development (2003) *Ex-Post Evaluation of the Current Protocol of the Fisheries Agreement between the EC and Mauritius, and analysis of the Impact of the future protocol on sustainability, including ex-ante evaluation.*

Table 5-16 Selected costs and benefits for the current EU and Mauritius fisheries agreement (based on 2004-2005 data)

Item	EU		Mauritius		Comments
	Benefits	Costs	Benefits	Costs	
Financial compensation (€)		€490,000	€490,000		
Licences fees (€)		€116,862	€116,862		Average of 2004 & 2005 licence fees received
Annual catches (tonnes)	1,351 tonnes				Estimated as average of 2004 & 2005 catches
Estimated value (€) of catches (based on €770/tonne)	1,039,500			1,039,500	Does not include variable costs for long-line or other tuna species
Employment	4		13 ACP Low as limited catch levels and EC vessel activity in Mauritian ports		
Estimated value added for vessels	900,000		?	?	
Estimated added value down-stream	121,000		?	?	

Mozambique

Mozambique recently signed an FPA for the period 2007-2011. Previous to this there was an agreement for 2004-2007 which was subject to an ex-post evaluation. This evaluation provides some information on the distribution of costs and benefits

Table 5-17 Selected costs and benefits for the EU and Mozambique fisheries agreement (based on 2004-2006 data)

Item	EU		Mozambique		Comments
	Benefits	Costs	Benefits	Costs	
Financial compensation (€)		€4,000,000 (+ additional €150,000 in 2005)	€4,000,000 (+ additional €150,000 in 2005)		Reference tonnage is 8,000 tonnes, 4,000 tonnes extra caught in 2004.
Licences fees (€)		€301,500	€301,500		Based on 2004 catch data and cost of licence at €25/tonne
Annual catches 2004 (tonnes)	12,060 tonnes of tuna				2004 data (only from purse seines, no long-line catch)
Estimated value (€) of catches (based on €770/tonne)	€9,286,200				
Employment	14		No Mozambique nationals (24 ACP)		
Estimated value added for vessels	€4,500,000				
Estimated added value down-stream	€1,100,000				
Supplies to the EU market	1.1% of total supplies (12,060 t in 2004)				

Source: Oceanic Development (2006) *Evaluation of the current protocol to the Fisheries Agreement between the EC and the Republic of Mozambique*

Côte d'Ivoire

Côte d'Ivoire signed a new fisheries agreement with the EU for the period 2004-2007. Prior to the negotiations, the EU undertook an ex-post evaluation of the previous agreement (2000-2004) and an ex-ante of the forthcoming agreement. The ex-ante was completed in 2006, so includes information on costs and benefits for the years 2004 and 2005 (Table 5-18).

In terms of utilisation (average between 2004 and 2005), there has been the following uptake of licences by EU vessels:

- Uptake of tuna vessels: 61% out of a possible 34 seiners and 9% of a possible 11 longliners;
- Uptake of trawlers: 0%.

The costs of the licences for trawlers are slightly lower than for other countries in the region (Table 5-19).

Table 5-18 Selected costs and benefits for the EU and Côte d'Ivoire fisheries agreement (based on 2004 & 2005 data)

Item		EU		Côte d'Ivoire		Assumptions
		Benefits	Costs	Benefits	Costs	
Financial compensation			€1,065,000	€1,065,000		
Licences (€) cost/year - potential based on full utilisation	Tuna		€93,500	€93,500		Estimated for 2004-2007
	Trawlers		€142,125	€142,125		
Licences (€) cost/year - actual based on uptake	Tuna		€120,046	€120,046		Average of actual costs for 2004 & 2005
	Trawlers		€0	€0		
Annual catches	Tuna	3844.5 tonnes				Average of catches for 2004 & 2005
	Trawlers	0				
Estimated value (€) of catches (based on €770/tonne)	Tuna	€2,960,265				Does not include variable costs for long-line or other tuna species
Direct employment		206		150-200		
Downstream employment		220		1,300		
Estimated added value		€800,000 (for vessels only after payment of licences)		€17,000,000		Estimated for 2005

Source: Oceanic Development (2006) *Evaluation ex-post of the fishing protocol between Cote d'Ivoire and the EU, and analysis of the impact of the future protocol on sustainability (including an evaluation ex-ante)*.

Table 5-19 Cost of trawler licences (per GT) across the different agreements in June 2006

Type of trawler licence	Cote d'Ivoire	Senegal	Mauritania	Guinea	Guinea Bissau
Cephalopod	100	166	283	137	137
Fish	100	102	132	123	123
Crustacean	100	136	226	174	174

Source: Oceanic Development (2006) *Evaluation ex-post of the fishing protocol between Cote d'Ivoire and the EU, and analysis of the impact of the future protocol on sustainability (including an evaluation ex-ante)*.

Notes: GT has been estimated from GRT for other agreements based on a factor of 1.6.

Pacific

A study carried out for the DEVFISH project in the Pacific assessed the benefits to the national economy from different longline operational models and licensing regimes, in order to determine which would provide greatest benefits to the national economy (Philipson, 2006). The study found that the scenario that provided greatest benefits to the economy was a domestic 'conventional' longlining operation (chilled fish air freighted to sashimi markets and albacore frozen for canning) with full scale on-shore value-adding through processing.

The study also concluded that the key element in increasing returns from longline fisheries is the development of full scale on-shore value-added processing, rather than national ownership of the catching sector. However, it may be beneficial at least in the short to medium term, to license foreign vessels to provide the fishing capacity.

5.5.4 Alternative scenarios: costs of not negotiating agreements

Fisheries worldwide are under increasing pressure and are changing as a result of technical progress, the emergence of new powers and the legitimate aspirations of many developing countries to exploit their own fisheries resources. As a result, it is becoming increasingly difficult for the EU to conclude bilateral agreements giving its fleets access to (surplus) stocks in the waters of third countries. Indeed, in many instances there is probably no surplus available.

The EU argues that if FPAs were not concluded then private agreements (of individual EU member states) would spring up, which would not guarantee sustainable fisheries. There is also the potential for EU vessels to re-flag to the nation state flag or another country under joint ventures or vessel transfers. In these circumstances the regulations and controls on the vessel may also be more relaxed and less likely to support sustainable fisheries, but benefits to the coastal state may be greater.

While FPAs bring regular annual funding from the access payments and associated licence fees paid by EU fishing vessels, they also have a number of conditions which some countries may perceive as burdensome. While EU FPAs are relatively transparent and detailed, there are other issues which may dissuade an ACP country from signing an FPA. These may include:

- Apparent conditionalities on expenditure from funding included in the FPA (i.e. the need to spend a proportion of it on implementing a sectoral fisheries policy, and being monitored on the outcomes);
- The transaction costs associated with negotiating an FPA with the EU (including travel, accommodation and subsistence; legal and other contractual costs);
- Offers from other countries with more attractive conditions, or fewer conditionalities;
- A wish to have shorter term fishing agreements and more flexibility.

There are alternatives to signing FPAs with the European Union, including:

- Signing fishing access agreements with fishing companies and fishing vessel owner associations (the tuna agreements signed by Taiwan and Japan with Mauritius and the Seychelles; the ANOBAC agreement with Madagascar allowing fishing access rights for Spanish tuna purse seiners which are members of ANABAC).
- Agreements with other countries e.g. China, Japan.
- The development of joint venture companies as a way of building up a local fleet and processing industry.

In fact several ACP countries have a mix of fishing agreements including an FPA with the EU (or an existing fishing agreement with the EU) as well as other agreements with private sector fishing companies, associations of fishing companies or other governments. This may be seen as a way of maximising revenues in the short term while also spreading the sources of revenue from access agreements. However it is not merely fishing agreements and the associated licence fees that may provide revenue to ACP developing countries but greater foreign exchange generation may come from associated development funding linked to the agreements and the fact that in some cases EU and non EU fishing vessels may use an ACP port for bunkering, transshipping and in some cases landing fish for local processing and or re-export.

An example is Port Louis in Mauritius which has become a major supply and bunkering port for Asian longliners which target tuna in the Western Indian Ocean. In this case the fishing vessels may have private licences to fish in Mauritian waters or may fish in other waters (e.g the EEZs of neighbouring countries such as Madagascar and the Seychelles), but whose visits bring foreign exchange into Mauritius from expenditure on port dues,

supplies, repairs and transshipment. In Mauritius a number of known IUU fishing vessels, which are not on the IOTC approved list, use Port Louis and spend money in port, even though there are no significant landings.

Likewise, Port Victoria in the Seychelles has become a major base for mainly EU purse seiner vessels which land tuna in the port for transshipment and re-export and for local processing. The annual gross expenditure of EU vessels in port exceeds the revenue and licence fees paid under the previous FAs and will probably exceed the revenue from the recently signed FPA signed between the EU and Seychelles.

Examples of terminated agreements

The EU may incur costs for terminated or non-renewed agreements, in the form of compensation packages for affected vessels. One example was the denouncement of the Agreement with Angola in 2006. Angola passed new fisheries legislation that required foreign vessels to operate under joint ventures such that the origin of fish would be Angolan. Vessels would have to report VMS data to Angola. As this was contrary to the EU's policy, the agreement was denounced. The EU put into action a 'conversion plan' to allow vessels to transfer to other fishing agreements, decommission or reflag. Aid was also provided from FIFG for tying up the vessel for up to 12 months (including 6 months from the expiry of the last protocol). Waivers for paying back FIFG construction aid or tie-up aids were also provided if they transferred to another flag.

The non-renewal of the Moroccan agreement required the EU to provide a total of € 297 million in financial support for the scrapping, reassignment, modernisation and permanent transfer of vessels towards a third country³¹. The previous agreement had allowed access for over 400 vessels employing around 4,300 fishermen and was worth approximately € 125 million per year (between 1995 and 1999).

5.6 Coherence issues

Article 23 (d) of the Cotonou Agreement stresses that there must be compatibility between fishing agreements and development. A study by ADE in collaboration with MRAG (2002) looked at the issues of complementarity, cooperation and cohesion between EU fishing agreements and EU development and environmental policy. This study which was commissioned by EU AidCo demonstrated that there were issues of lack of coherence between these three EU policy themes. In particular, funding for fisheries projects from national indicative programming often seems to disappear when countries sign a fisheries agreement with the EU e.g. Solomon Islands. However, it must also be recognised that the countries themselves must identify fisheries as a priority sector in the Country Strategy Paper in order for funding for fisheries to be available, and inevitably countries have many other concerns including health, education and infrastructure. The European Parliament has also criticised the implementation of fishing agreements in the past, as well as the audit and traceability of payments associated with fishing agreements.

There are a number of EU policies that have impacts on the fisheries sectors of developing countries. These include development assistance (within National and Regional Indicative Plans) which are concluded both with individual countries and with regions, FPAs that are concluded bilaterally and Economic Partnership Agreements (covering trade agreements) which are concluded regionally (not necessarily the same regions as the development assistance regions). The EU's fisheries policies also have impacts on wider economic and social issues in developing countries. However, the FPAs show a distinct trend away from

³¹ Proposal for a Council Regulation for a Fisheries Partnership Agreement, 2006-2010

mixed towards tuna agreements. This avoids many of the coherence issues such as problems with stock assessment and surpluses and does demonstrate a change of direction from the FAs.

In addition to coherence issues between the EU's policies for fisheries, development, trade and environment, there are also coherence issues between bilateral and multilateral donors (e.g. EU Member States aid agencies and EU DG Development), as well as potential coherence issues between coastal states' national development and poverty reduction policies and their fisheries policies.

The impacts outlined in the impact assessment in Section 5 (under economic, social, environmental and institutional themes) feed directly into an analysis of the key coherence issues. These are summarised in Table 5-20, and discussed in more detail below.

Table 5-20 Key Coherence Issues related to Fisheries Partnership Agreements

		Fisheries Partnership Agreements	
		Positive Coherence	Negative Coherence
Development objectives (for coastal state)	Macro-economy budget	+ Resource rent from contribution payment and licence fees	– Economic costs of negotiating and administering an agreement – Majority of financial contribution now into fisheries sector so less for wider development objectives
	Development of local fishing industry	+ Potential support from fisheries policy to local fishing industry	– Experience shows that FAs have failed to promote the establishment of a local fishing industry – Competition with EU fleets who have more advanced and effective equipment
	Development of local port activities	+ EU fleets often land or tranship in port (especially if supplying local fish processing sector)	– EU vessels may land directly into Europe by-passing any landing in the coastal country – EU vessels may land in other countries where services are cheaper
	Development of local fish processing sector	+ EU fleets often supply local fish processing sector	– EU vessels may tranship in country but produce is not destined for local processing factories – Increased industrial processing may reduce options for women previously dominating artisanal processing
	Food Security	+ Local landings by EU vessels including by-catch (at market rate or low/no cost)	– Increase in local market prices if resources more scarce due to over-exploitation or increased exports/ transhipment out of country
	Protection of small-scale fishers and processors (artisanal)	+ FPAs specify zones protected for small-scale fishing + FPAs usually target species that are not eaten locally	– Small-scale and local fishers can be in direct competition with EU vessels for resources – Local landings can depress local market prices and reduce livelihoods for small scale fishers
Fisheries Objectives	EU fleet and consumers	+ Provides fishing opportunities for EU vessels, maintains presence of EU DWF in external waters + Provides fish to supply EU Processing sector and EU consumers	

	Sustainable fisheries	<ul style="list-style-type: none"> + Support for national fisheries policy could enhance sustainable fisheries + Exclusivity clause restricts other private EU vessels + Joint Scientific Committee brought into most FPAs + Some agreements allow for technical measures such as biological recover periods, by-catch limits, 	<ul style="list-style-type: none"> - Concerns that fishing possibilities not based on stock assessments - Concerns that support for fisheries policies cannot be evaluated and may not be successful - Exclusivity only covers other EU vessels not other countries - Joint ventures may be less transparent and are no longer part of an overarching 'framework'
Trade Objectives	Exports	<ul style="list-style-type: none"> + If provided access to EU vessels able to charter vessels and import into the EU under 'rules of origin' + Supplies of fish from EU vessels and low tariff barriers (under current Cotonou agreement) can favour the development of a processing industry and exports 	<ul style="list-style-type: none"> - Support for the EU processing sector can be at the expense of developing countries able to extract added-value from the fishery - Having a fishing agreement does not necessarily mean that the coastal country can overcome non-tariff barriers to exports such as sanitary and hygiene measures
Environmental objectives		<ul style="list-style-type: none"> + EU fisheries policy promotes sustainable fisheries (see above) + Gear restrictions and exclusion zones contribute to maintaining biodiversity and ecosystem quality 	<ul style="list-style-type: none"> - Ecosystem impacts of fishing - Biodiversity protection measures used within EU waters may not be applied to FPAs

5.6.1 FPAs and Development Policy

The potential impacts of FPAs on local development objectives for the coastal state, and their coherence with EU Development Policy, are outlined below.

Macroeconomic issues: resource rent and financial contribution

Coastal states benefit through the financial contribution paid by the EU and the licence agreements paid by shipowners, and are able to invest these funds into local development. Through fishing agreements, even if governments have limited capacity for managing a fishery, they are able to extract some resource rent from it and can use this to promote development for a larger number of people in the their country, for example through contributions to health, education or transport systems.

However there are also costs associated with an agreement, including negotiation costs and the costs of monitoring compliance of an agreement. Carrying out MCS and managing an observer programme can be costly, and this is one of the reasons the Seychelles does not currently take up the opportunity given within the agreement for placing observers on board EU vessels fishing for tuna in their waters.

There has been an increasing trend for more of the financial contribution to be invested back into the sector to ensure that there is an effective fisheries policy and implementation measures in place. There is no guarantee that this would happen but it does seem to be welcomed in several states as helping to promote re-investment in the sector. While it is important for sustainable fisheries and prevention of IUU fishing, it also means that the government's resource rent or available finance to go into more general development objectives is reduced. For example, the contribution to support of the fisheries policy in Madagascar increased from 61% in the previous FA to 80% in the current FPA, and that of Cape Verde increased from 41% to 80%. Licence payments from EU fleets also contribute to resource rents and the contribution from shipowners has increased slightly in recent

years (although this has been coupled with a decrease in contribution from the EU, so the overall contribution has remained fairly constant).

FPAAs have an increased emphasis on development-type issues compared to the FAs. These issues are very complex and difficult to address, and go beyond the 'traditional' fisheries issues of stock assessment and MCS. The FPAAs may not be best route to provide this broader development support to the fisheries sector.

As discussed in section 5.5, the extraction of resource rent by individual countries varies considerably. In many ACP countries which have signed fishing agreements with the EU, the majority of the potential resource rent which could accrue to the country, through local landings, processing and the development of an indigenous fishing fleet, leaks from the economy to EU countries and other destinations.

Development of local fishing capacity

One of the potential economic and local development benefits of an FPA is the potential support for a national fishing fleet. A number of developing countries have included the aim to develop their national fleets within their development plans (or Poverty Reduction Strategy Papers).

FPAAs provide support for developing and implementing a national fisheries policy, which could potentially include support for a national fleet. They also 'encourage' the development of an environment supportive of investment, including joint ventures with EU companies. However, it is not clear how the development of an investment environment may be encouraged under the FPAAs, and whether or not any joint ventures will materialise as a result is not known.

Many coastal states see the development of national fishing capacity as a means to increase the economic benefits that are captured locally from the fishery. FPAAs are unlikely to contribute much to the development of local fishing capacity, despite the provision for joint ventures. Previous FAs included targeted measures which often included specific funds to support the national fleet, although unsurprisingly, there have been very few success stories in this area. Despite over 20 years of agreements with the EU, Seychelles still does not have a national industrial fleet targeting tuna. There are a number of Seychelles flagged vessels catching tuna but these are almost exclusively owned by EU companies (in the case of purse seines) or Asian companies (in the case of long-line vessels).

There is uncertainty concerning the potential role of joint ventures in FPAAs. There may be other constraints including investment conditions within the country. Furthermore, the national economy does not necessarily benefit substantially from joint ventures. Namibia established joint ventures in order to develop its national fleet. However, often the local part of the company provided the quota (as quotas were distributed only to Namibians), and the foreign operation provided everything else (vessel, crew etc.). As a result, much of the benefits were captured by the foreign companies (Manning, *pers. comm.*). The most important contributor to value-added for the coastal state is not who catches the fish, but who processes it.

Development of local port and processing industries: potential for added-value

In most cases it is not necessarily important who carries out the fishing activity, but who carries out value-added activities. Local processing industries are important for creating employment, supporting local development and extracting the added-value potential from any available natural resource. The associated landings in port also support a wide range

of local economic activities and services ranging from port dues to vessel repairs and maintenance, purchase of fuel, water and food, and entertainment for the crew.

FPA's provide an option for providing fishing capacity, but management is needed to ensure subsequent economic benefits are captured by the coastal state, which will require vessels to land locally. In some cases fishing agreements with the EU have supported the development of local tuna processing industries such as in the Seychelles and Cote d'Ivoire. The EU fleets provide approximately 80-90% of the requirements of Seychellois tuna processing plants, and around 64% of total capacity in Cote d'Ivoire (64,000 tonnes in 2000-2003).

However other countries have minimal processing sectors, such as Mauritania where the majority of fish caught within the EEZ by EU vessels is landed directly into EU ports and processed by factories in Spain, France and Italy. The presence of EU vessels exploiting tuna may not support development of local processing capacity; the EU evaluation summary (within the Proposed Council Regulation for the Angola-EU fisheries agreement of 2000-2002) stated that: *'Angola wishes to develop its own onshore tuna processing industry [and] the number of [EU] tuna vessels having access to Angolan waters has consequently been decreased'*.

EU vessels that land directly into Europe can by-pass custom requirements of other countries. The receiving processing plants do not need to check for SPS requirements from a third-country's facilities. However, there has been an increasing move towards EU processing sectors importing 'part-processed' tuna such as loins, but much of this is undertaken in third countries, notably Thailand and Colombia (MRAG, *in prep*).

In recognition of this a number of current and previous fishing agreements have included the requirements for local landings, although the extent of this requirement ranges considerably between different agreements. In some of the more recent partnership agreements a specific requirement has been replaced by a financial incentive for landings, due to free trade principles. For example in Cape Verde the FA (2001-2005) required longliners to land 5% of their catch for transshipment. The current FPA (2006-2012) allows for a €5/tonne reduction in the licence fee for tuna landed in Cape Verde and a further €5/tonne reduction for tuna sold to a local processing factory.

One of the factors behind the relative success of Cote d'Ivoire is the high quality port facilities which provide a network of services specialised for the tuna industry. The success of Seychelles is sometime argued to be the large distance to EU processing plants, which favours landing at a port closer to the fishing grounds. The flip-side of this arrangement is that these countries become relatively reliant on EU vessels which may weaken their negotiating position with the EU in future agreements. This appears to be the case with Senegal, where although a new agreement has not been reached with the EU (since the end of the last agreement in 2006) a six month extension was granted for tuna vessels only.

Even with support to a local processing industry, there may be potential negative impacts on actors within artisanal processing sector. For example, in Senegal this sector is traditionally dominated by women, who have lost out to industrial processing since more fish has been diverted to exports rather than local consumption.

Food security

There are complex relationships between the potential impacts of an FPA on food security and much depends on the species that are being caught. Potential negative impacts can result if the EU fishing fleet is targeting the same species as those eaten locally and if the fishing results in a reduction in these stocks and potential price rises on the local market.

These negative impacts may also result if the EU fishing fleets affect locally-eaten stocks through by-catch or by using fishing methods that damage the ecosystem with knock-on effects on these species.

There has been concern raised over the previous agreement with Senegal where the EU fleet was targeting the same coastal demersal species as those targeted by the artisanal fleets. A locally-eaten species 'thiof' (spp. Serranidae, *Epinephelus aeneus*) has now almost completely disappeared from traditional dishes. However, fishing agreements are one of a number of factors that have reduced the availability of this and other coastal demersal species on the local market. Exports of these species have been increasing spurred on by export subsidies, the devaluation of the Senegalese currency (CFA) and structural adjustment processes which enhanced the need for foreign currency.

In contrast there may be positive impacts on food security, where increased employment resulting from the FPA (crew, port or processing sector) increases individuals' purchasing power to buy food staples. There are also cases where EU fleets are encouraged or required to make local landings of by-catch at low or no cost, supporting to the availability and lower cost of fish on the local markets. This is the case within the Pacific FPAs where by-catch must be landed and provided at no cost to support local food security. These practices, however, in turn can be detrimental to small-scale or local fishing industries as it can distort market prices and reduce the price they are able to obtain for their catches, threatening their livelihood.

Protection of small-scale fisheries

There are concerns where the EU fleet targets the same species as the artisanal fleet. This may lead to conflicts between vessels and gears, competition for the same stocks, and food security issues. Whilst the EU fleet targets 'surplus' resources, where they are targeting the same stocks as local fishers, this will still have an impact on the economic profitability of the fishery, for example, by reducing catch rates, even though the fishery may be within sustainable limits. The FPAs focus mainly on exclusively tuna agreements, therefore this is less likely to be the case anymore. The only mixed agreements currently are Mauritania and Morocco, where interactions with domestical and small-scale fisheries can still be expected to occur. In agreements with shrimp, the bycatch issue can also affect artisanal stocks. In Mauritania there has been overlap between the artisanal fishery and the EU vessels both targeting octopus, and although the number of vessels has now been decreased from 55 to 43 between the previous FA (2001-2006) and the current FPA (2006-2008), Gross Reference Tonnage has increased from 16,500 GRT/year to 18,600 GRT/year.

EU agreements have coincided with the development of small scale fishing in the 1980s, particularly in West Africa. Domestic fleets are increasingly able to exploit coastal, demersal and pelagic resources (although pelagic resources are under less strain as they are less attractive for export), and are able to travel further from the coast. Distant water fleets are therefore in direct competition with local and artisanal fleets for coastal demersals, crustaceans and cephalopods, and often outside the 12nm zone usually reserved for national fleets. For example the Senegal-EU agreement from 1990 to 2006 allowed for fishing possibilities for inshore demersal fishing and cephalopods, although the possibilities were decreased successively in 1994, 1997 and 2001, and there are suggestions that one of the difficulties in negotiating a new agreement was the reluctance of Senegal to allow further foreign fishing possibilities of these coastal demersal resources.

As described above, local landings of fish by EU vessels onto the local market can have beneficial effects for food security for the general population, but can have detrimental affects on local small-scale fishers who receive a local price for their fish, and as a result may face food security issues themselves.

5.6.2 FPA and EU Development funding

The ADE (2002) study on coherence between EU fisheries agreements and EU development policy highlighted the fact that when a country signs a fisheries agreement with the EU, funding for fisheries through the National Indicative Plan (NIP) often disappears, although this is also dependent on the priorities identified by partner countries. In some cases, funding for fisheries may be provided through Regional Indicative Plans (RIPs), although these usually support issues of regional concern, such as the SADC Monitoring, Control and Surveillance Programme. Regional funds are unlikely to address specific concerns of the fisheries sector of a particular country in the same way that development assistance would.

Table 5-21 shows the current situation of a selection of countries from the Atlantic, Indian and Pacific Ocean areas, with and without fisheries agreements with the EU, and whether fisheries is supported explicitly within the NIP and RIP from the 9th EDF (2002-2007 funding period). Only two countries out of 17 with FAs or FPAs receive EU development funding for fisheries through national programmes, although fisheries was supported through regional development assistance in 16 of the cases. This is not, in itself disadvantageous, but it does mean that any development of the national capacity will be limited. The exceptions are the Republic of Guinea (which received €1 million for rural development including fisheries surveillance), Senegal (which received funding for governance to ensure sustainable fisheries management), and to some extent Mozambique (where fisheries received some funding under food security and agriculture projects). In the case of Solomon Islands, they did have an NIP fisheries programme until they signed an agreement and this disappeared.

The ADE (2002) study showed that, even within the RIPs the value to fisheries was only 1.5% of development assistance to the natural resources sector which is far less than the contribution that fisheries makes in economic terms. There appears, therefore, to be an opportunity cost to fisheries in trying to fund development through fisheries agreements rather than development policy; if a country signs an FA or FPA, they may lose potential development assistance to the fisheries sector through EU Development funds. There does, therefore, still appear to be a coherence problem here.

In other cases, countries do not have a fisheries agreement with the EU, but do receive funding for fisheries through the NIP, for example Sierra Leone, Kenya and South Africa. There are some countries that do not have a fisheries agreement with the EU, nor do they receive funding for fisheries under the NIP, for example, Equatorial Guinea, Namibia, Somalia, Tanzania and Palau. It should be noted that in order for DG DEV to support fisheries through the NIP, the countries themselves must identify fisheries as a priority sector; often agricultural interests dominate these negotiations and the fisheries sector is left out.

Table 5-21 Funding for fisheries projects under 9th EDF National Indicative Programmes (NIP) and Regional Indicative Programmes (RIP), and whether countries have EU fishing agreements

	FPA or FA	Fisheries in 9 th NIP	Fisheries in 9 th RIP	Comments
Atlantic Ocean				
Angola	✓ → ✗	✗	✗ / ✓ (SADC/ESA)	FA denounced 2006 Fisheries MCS received funding from 8 th EDF RIP (2000-2006); SADC RIP – doesn't include fisheries; ESA and Indian Ocean RIP does include fisheries
Cape Verde	✓	✗	✓	
Cote d'Ivoire	✓	✗	✓	
Equatorial Guinea	✗	✗	✓	FA was signed in 2001 (when 9 th EDF was being finalised), but not implemented
Gabon	✓	✗	✓	
Gambia	✗	~	✓	NIP includes € 15 m for rural development, inc. development of producer organisations and inter-professional associations (inc. for fisheries)
Guinea (Republic of)	✓	✓	✓	NIP includes €31.6m for rural development inc. fisheries surveillance
Guinea Bissau	✓	✗	✓	
Kenya	✗	✓	✓	NIP includes infrastructure for support to fisheries private sector, and quality control.
Mauritania	✓	✗	✓	
Namibia	✗	✗	✗ / ✓ (SADC/ESA)	Fisheries MCS received funding from 8 th EDF RIP (2000-2006) SADC RIP – doesn't include fisheries; ESA and Indian Ocean RIP does include fisheries
São Tomé & Príncipe	✓	✗	✓	
Senegal	✓ → ✗ (not renewed 2006)	✓	✓	NIP includes funding for enabling environment for private sector investment, and governance to ensure sustainable fisheries management
Sierra Leone	✗	✓	✓	NIP includes support to fisheries includes stock assessment and assessing fishing opportunities for an EU agreement
South Africa	✗	✓	--	NIP includes support for fisheries surveillance
Indian Ocean				
Comoros	✓	✗	✓	
Madagascar	✓	✗	✓	
Mauritius	✓	✗	✗ / ✓ (SADC/ESA)	SADC RIP – doesn't include fisheries; ESA and Indian Ocean RIP does include fisheries
Mozambique	✓	~	✗	NIP includes food security and agriculture; €2m allocated to fisheries in projected timetable for support Fisheries MCS received funding from 8 th EDF RIP (2000-2006)
Seychelles	✓	✗	✗ / ✓ (SADC/ESA)	Funding for fisheries had been included in 5 th and 6 th EDF NIP; SADC RIP – doesn't include fisheries; ESA and Indian Ocean RIP does include fisheries
Somalia	✗	✗	✓	
Tanzania	✗	✗	✗ / ✓ (SADC/ESA)	SADC RIP – doesn't include fisheries; ESA and Indian Ocean RIP does include fisheries
Pacific Ocean				
Kiribati	✓	✗	✓	
Micronesia	✓	✗	✓	
Palau	✗	✗	✓	
Solomon Islands	✓	✗	✓	

SADC = Southern Africa Development Community RIP;
 ESA = Eastern and Southern Africa & Indian Ocean RIP.

Whose responsibility is it to tackle the development issues?

A key question is the degree to which FPAs should be considered development instruments. There are some voices that suggest that the commercial and development aspects of fishing agreements should be de-coupled, but DG FISH argues that this would go against the partnership values to support sustainable fisheries, and would put FPAs in danger of being considered subsidies if they solely provided financial compensation for fisheries access. However, the general consensus emerging is that government to government transfers (i.e. financial compensation paid under fisheries agreements) do not constitute subsidies, but there may be aspects of fisheries agreements that would be considered subsidies, such as whether the shipowners pay the full market rate for licences and fishing opportunities.

Evaluating the progress of national fisheries policies

Currently the support within FPAs for development and implementation of fisheries policies has the potential to contribute to the sustainable management of EEZ resources. However, the targeted actions under the previous fisheries agreements had a limited impact on fisheries management in coastal states, and it is unlikely to be very different for the FPAs. Furthermore, the contribution provided under FPAs is often lower than under FAs, because the FPAs tend to focus on tuna rather than demersal stocks. FPAs should not be the only form of support to a country's fisheries sector or institutions, either from the EU or other donors.

The FPA documentation states that the Commission 'will develop an approach on how to implement, monitor and control the funds envisaged for the part of the financial contribution devoted to fisheries partnership actions' (COM(2002) 637 final). The FPA documents themselves state that the Community and coastal state shall agree on a multiannual sectoral programme and detailed implementing rules for these funds, including annual and multiannual guidelines and objectives. On an annual basis, the coastal state should inform the Community of the allocation made, and an annual evaluation will take place, where the Community may request the annual allocation to be revised to bring it into line with its results.

However there are still concerns on whether this support will be effectively monitored or not and there is always the danger that the amount directed towards the fisheries sector may be reduced if the expected outcomes are not achieved. There are already some FPAs in place and it is not clear what monitoring systems are being used within the Joint Committee. Informal discussions with Seychelles authorities suggest that the government is less accountable on the use of funds for developing a fisheries policy compared to the justifications required with the previous targeted funds. There are also concerns that although considerable funds have been channelled into the fisheries sector through fishing agreements, over the years, there have not been significant improvements to fisheries management or enforcement. In some cases, the potential financial gains from fisheries, including payoffs from illegal fishing boats, may have helped fuel corruption in the sector.

Importance of accompanying development measures

If the FPAs, as fisheries agreements, are considered as commercial agreements, there is no reason why this should be a problem and indeed the coastal state should be allowed to invest the money as it sees fit. However, if the FPAs are to be an instrument for development (and coherent with the EU's development policy), with the objective of contributing to responsible, sustainable fisheries, then the fact that there is no guarantee that these funds will be put towards improving fisheries management and enforcement is a cause for concern.

One option would be for there to be accompanying development measures to augment the funds to support national fisheries policies. Support for improving fisheries management and governance could also be channeled through EDF funding streams, where there is closer control over how the money is spent and whether the objectives are achieved or not, and also the opportunity for more technical cooperation. Considering the technical and scientific expertise required to carry out stock assessments, greater cooperation in a technical sphere should be foreseen, to help build capacity in the coastal states, and to support the process of policy development, management planning and implementation. This could just as well (if not more effectively) be tackled under development assistance than through the financial payments to the treasury and fisheries sector associated with fishing agreements, with no real technical support.

Currently the opposite is true, where fisheries appears to 'disappear from EU development funding through National Indicative Plans if they are receiving support through a fisheries agreement, although it can be argued that it is exactly when there is an agreement that support from the development side is required. Fisheries are more likely to be included in the Regional Indicative Plans than in NIPs, although they will lack a national focus and the potential to tackle national fisheries issues.

More active involvement of DG-Development

It may be important for DG-Development (or the individual EC Delegations tasked with development) to take a more active role in development and evaluation of Fisheries Partnership Agreements. In some [or all agreements e.g. Cape Verde] the legislative financial statements defines DG Fish and the EC Delegation being responsible for regular monitoring of the implementation of the FPA including utilisation rates and catch data. Questions that can be posed include:

- Are the EC Delegations present at the Joint Committee meetings?
- Is there anyone specific within the Delegation put in charge of the fisheries agreement – do they represent DG-Fish or DG-Development issues. Have they been trained in trade, environment, fisheries, and development issues – as well as coherence?
- Is there a need for there to be more capacity within DG Development to assist with the development aspects of FPAs and their coherence with EC development and country national development priorities?

Conditionality of good governance or a national fisheries policy in place

Another option would to conclude FPAs only with states that have a proven track record on tackling corruption, transparency and good governance, and who already have a fisheries policy in place. This, however, may call into question a number of countries with which the Commission is moving towards negotiating FPAs, such as Liberia and Somalia.

5.6.3 FPAs and EU fisheries policy

In relation to fisheries, the EU has committed to contribute to sustainable fisheries inside and outside Community waters. Different EU policies contribute towards this:

- the specific objective of the Common Fisheries Policy is to maintain the European presence in distant fisheries and to protect European fisheries sector interests;
- the specific objective of the European Development Policy (in relation to fisheries) is to foster Developing Countries' capacities to exploit their marine resources, to increase local value added and to obtain the fairest price for access rights to their EEZ by foreign fleets.

In the Council conclusions on FPAs (2004), the Council highlighted the need to guarantee and step up its action to establish sustainable fisheries outside Community waters, in accordance with the general principles as defined for the conservation and sustainable management of fisheries resources under the CFP.

Potential benefits of supporting national fisheries policy

There are a number of benefits of the support FPAs can provide to coastal states for developing and implementing a national fisheries policy. Experience has shown that countries with such a framework (e.g. Namibia, and to some extent Mozambique) have been more successful in managing their fisheries and extracting resource rent. There is also the potential that these policies should be applied to all foreign fleets (including non-EU vessels) and would assist the EU shipowners by providing a level playing field. By contrast those countries that do not have such a framework often have significant problems in promoting responsible fisheries.

For example, an evaluation of the 2000-2003 Cote d'Ivoire-EU agreement stated that: *'the effectiveness of the agreement towards the objective of promoting responsible fisheries in Cote d'Ivoire is...disappointing as the financial resources of the protocol have not been used rationally in the absence of a coherent framework that a national fishery policy would have provided'*³².

In the past some of the activities supported through targeted actions, such as MCS or data collection and stock assessment, have come to an abrupt halt at the end of an agreement and at the end of the associated financing.

Sustainable management measures

FPAs have integrated a number of measures to promote sustainable management such as the exclusivity clause (for other EU vessels), biological recovery periods, by-catch limits and restriction of fishing zones. However these elements are not consistently applied throughout all the agreements, and there is some concern that measures that would be applied within EU waters are not applied within developing country EEZs.

Impacts on stocks

There are concerns that fishing possibilities for EU agreements are not always based on stock assessments. In many cases, reliable stock assessments are not available, making it difficult to assess whether a surplus exists, and how much. Fisheries agreements should always only target surplus stocks, which the coastal state does not have the capacity to harvest itself. This is essential in order to ensure coherence with both environment and development objectives. If there is no surplus, then foreign fleets will contribute to over-exploitation of the stocks, contributing to environmental impacts on the both fish stock and the wider ecosystem. In relation to development, the foreign fleets would be in direct competition with local fleets targeting the same stock.

Although evaluation studies are undertaken by the Commission, they are based on the information available and do not comprise rigorous 'stock assessments'. Even though the data available on stocks may be poor in many cases, there are often telling signs that the stock is in danger, and in these instances FPAs should take a precautionary approach in line with the Code of Conduct.

³² Megapescas (2006) Evaluation ex-post of the fishing agreement between Cote d'Ivoire and the EU and analysis of the impact of future protocols on the sustainability (including an ex-ante evaluation) – should this information go into the confidential annex?

Joint ventures

Joint ventures provide potential for developing both the national fishing fleet and national processing capacity of the local state. They are supported 'in principal within the text of most FPAs. However, the specific details of how these will function and how they fit into the regulative framework is not given in the protocols. There are some concerns that because joint ventures (for fishing operations) will fall outside of the FPA, they will not be subject to the same restrictions as other EU vessels which are put in place to promote sustainable exploitation, and may result in an increase in fishing effort. In addition there is the issue of the extent to which joint ventures really lead to a sharing of catch values, value added and technology transfer with ACP countries.

IUU fishing

Strengthening a country's ability to tackle IUU fishing by all vessels in its waters (beyond just Community vessels) requires support for MCS activities in general, and increased capacity for enforcement. This may include MCS vessels, air surveillance, satellite monitoring and observers for all vessels. Under the FPAs, this may be provided for under the support for implementing a sectoral fisheries policy, if the coastal state defines reducing IUU fishing as one of its objectives for the fisheries sector.

However, there are still concerns that the FPAs do not provide the coastal state with the means to effectively track vessels. Although most FPAs now allow for VMS systems, the reporting from these systems goes via the Member States first and may not provide timely information to the coastal state. FPAs also allow for observers to be on board, but some countries may not enforce this if the programme is costly and complicated to manage.

5.6.4 FPAs and EU trade policies

The EU's external trade policy aims to promote a competitive European economy in an open world trade system organised by multilateral rules. The three main objectives are to:

- ensure that the European economy is open to the world and competitive in foreign markets (secure real market access in foreign countries);
- support a strong multilateral trading system as the most effective means of managing trade and enforcing rules;
- promote European values on democracy, rule of law, environment, social rights etc. as a way of reinforcing sustainable development.

The EU also uses trade instruments in order to foster development, promote regional development and/or political stability.

FPAs affect international trade in fish and fisheries products. By allowing EU vessels to catch fish in other countries' EEZs, they increase the amount of fish available to the EU. Where EU vessels land fish caught under FPAs directly into EU ports, FPAs have the effect of reducing the amount of international fish trade; if FPAs did not exist and the EU had to import fish to supply its processing factories and consumers, there would be more fish trade between the EU and those countries. On the other hand, FPAs increase fish exports from the EU to coastal states in those cases where EU vessels land the fish in-country for local processing. For example, the fish caught by an EU vessel fishing in Seychelles' EEZ would be of EU 'nationality'. Therefore when those fish are landed in Seychelles for processing, they are 'exported' from the EU and imported into Seychelles. This inflates the export of fish from the EU to those coastal states. If the coastal state had sufficient harvesting capacity to catch those fish themselves, the fish would not need to be 'exported' from the EU to then be processed.

One of the forthcoming trade instruments that will have an impact on ACP countries, is the Economic Partnership Agreements (EPAs). The EU's current trading arrangements with ACP countries offer unilateral trade preferences to ACP countries (access to the EU market at 0% tariff). This contravenes WTO rules, as either the EU would have to offer the same tariffs to all developing countries, or the ACP countries would have to offer reciprocal tariffs for the entry of EU goods to their markets. The EPAs are therefore being negotiated by the EU with regional groupings of ACP countries as free trade area agreements, in order to bring the EU's trading arrangements with ACP countries into line with WTO rules. There are six regional groupings: Caribbean; Central Africa; Eastern and Southern Africa and Indian Ocean; Pacific; Southern Africa Development Community; and West Africa.

It is still not clear how FPAs and EPAs will complement or combine with each other. There are a number of arguments to **keep fisheries access separate from EPAs**:

- FPAs are related only to access to the fishery and is not directly related to trade relationships – these are not overtly negotiated in the agreements;
- Fisheries access may be traded off against other EPA issues – leaving ACP states in a weaker position;
- FPAs are not compatible with EPAs as they cannot be arranged on the same regional groupings as the EPAs;
- EU does not accept regional FPAs although some countries would prefer such an approach;
- Although 'development objectives' run through EPAs, these agreements are not the place to consider regional fisheries management objectives;
- EPAs would not include any funding for development initiatives.

However there are a number of aspects of where **FPAs and EPAs have impacts on each other**. These include:

- The combination of the Rules of Origin (RoO) and the access of DWFs to ACP waters gives the EU a trade/marketing advantage in that:
 - The DWFs can land their catch within ACP ports at a higher price because the fish is considered 'originating';
 - The DWFs can land their catch into EU ports and have less competition from ACP processors as they have trouble with the RoO rules;
 - The DWFs have access to fisheries resources before ACP states can charter vessels and import the resulting catch into the EU;
 - The DWF can be considered to be receiving 'subsidies' in that they have to pay a lower licence fee and the negotiation costs for establishing the agreement are covered by the EU. This means that they can supply the EU market at a lower cost than other fleets.
- The SPS rules also reinforce this and give DWF a competitive advantage because a number of countries cannot import directly into EU as they have not passed the required standards.

If fisheries is a separate chapter in EPAs a number of queries remain such as:

- The Eastern and Southern Africa (ESA) group is negotiating to maintain preferred tariffs for fisheries. The question is whether this is WTO compatible if the rest of the EPA covers 'substantially all trade';
- The question will also be whether the EU will agree to this within the negotiation and whether fisheries may be traded off against other issues, such as market access to the EU for other products. All the ESA states would have to agree to the importance of fisheries to maintain this as a priority;
- There are some concerns by ACP states that they should not be negotiating EPAs before they know what the outcome of the next WTO round will be, as the main objective of EPAs is to bring EU-ACP trading arrangements into line with WTO rules;

- The degree that fisheries policy and sectoral development are treated in EPAs is variable.

If access, development and sustainable management issues are not included in the EPA, where should they be included? One option would be for an overarching regional framework agreement that does not cover fisheries access but covers issues such as the regional sustainable management objectives, development aims etc. This could cover minimum requirements for fisheries agreements and could ensure that they are compatible with the EPAs – or that impacts of EPAs and FPAs are mitigated through development assistance. The other aspect of this would be how the ‘development’ agenda could have more of a seat at the table of EPA and FPA negotiations to ensure that fisheries development and knock-on effects such as food security and employment are taken into account.

5.6.5 FPAs and EU environmental policy

EU environmental policy focuses on four key areas:

- climate change and global warming;
- the natural habitat and wildlife;
- environment and health issues;
- natural resources and managing waste.

All EU policies and actions should take into account the potential environmental impact, including agriculture, overseas development, energy, fisheries, industry, the internal market and transport. The 2002 reform of the CFP aimed to bring the environmental dimension more to the foreground in fisheries policy, and tackle it explicitly in fisheries policies. This includes taking into account the impacts of fishing on the wider marine ecosystem. For FPAs to be coherent with environmental policy, they must be based on the exploitation of surplus stocks, and therefore fishing opportunities must be based on stock assessments. There has been a trend away from mixed agreements and towards tuna agreements (e.g. the Gabon and Mozambique FAs were mixed agreements; their FPAs are tuna agreements), which may help satisfy environmental concerns about over-exploited coastal demersal stocks. However, the Mauritanian FPA still allows access for EU vessels to octopus, even though recent assessments indicate there is 31% excess capacity in the fishery (CFFA, 2006).

5.7 Alternative policy options

For developing coastal states wanting to increase the fishing effort in their EEZ, a number of options are available to them:

- Sign an FPA with the EU;
- Establish joint ventures for fishing operations;
- Sign a private agreement with EU operators;
- Sign an access agreement with a non-EU country.

Table 5-22 compares the economic, value-added, social, institutional and environmental benefits and concerns for the coastal state of each of these options. The joint venture option is assumed to be joint ventures with EU companies.

Whilst FPAs seem to be a viable policy option for the EU in the medium term, developing countries increasingly want to develop their own fishing capacity through chartering vessels or joint ventures, in order to guarantee local landings to contribute to the development of on-shore value-added processing so that the national economy can gain the maximum possible benefits from the fishery resources in the EEZ. As a result, there may be a move by coastal states away from signing FPAs with the EU. This has already occurred in the case of Senegal and Angola. Mozambique was not keen on signing an FPA, and the agreement with Tanzania has not yet reached implementation phase.

Furthermore, coastal states sometimes feel that although the EU may offer greater financial contribution than other countries for fisheries access, they also put too many conditionalities on the agreement and how the financial contribution is spent. With emerging powers such as China playing an increasingly important role in fishing, fish processing and trade, and an increasing role in the exploitation of natural and mineral resources worldwide (especially in Africa), coastal states may look East for new opportunities for fisheries agreements that come with non-accountable financial compensation.

The other two options both involve the use of EU fishing vessels: joint ventures and private agreements. Private agreements are less transparent than FPAs and generally provide lower compensation for the coastal state; they are less desirable than FPAs. Their advantage to the EU over joint ventures is that they maintain the Community origin of catches, thus maintaining the EU's status as a main player in world fisheries. Joint ventures are likely to be more beneficial to coastal states, whilst still maintaining benefits for the EU through employment on vessels. Although the catch would not be of EU origin, EU processing plants could still benefit from the catch, through, for example, import of part-processed products for final processing in Europe e.g. tuna loins.

Table 5-22 Matrix comparing the economic, social, institutional and environmental benefits of FPAs, Joint Ventures, private agreements and agreements with non-EU countries

	Economic (financial contribution)	Value-added (processing & trade)	Social	Institutional	Environmental
FPA with EU	+ Greater contribution and licence fees	- Value-added may be limited, depends on landings and local processing capacity	+ Some employment with good working conditions; - Potential for conflicts with local fleet	+ Financial support for management - Authorities lack control over EU vessels (reporting, VMS)	+/- FPAs include provisions for sustainable management but stock assessments not always used
Joint venture with EU	- Lower licence revenues	+ May provide greater value-added potential through increased local landings, leading to processing and exports - Revenue may accrue to EU partner	+ More employment opportunities due to locally-based fleet	+ Authorities have greater control over vessels (local VMS reporting, catch reporting)	+/- Environmental impacts not clear
Private agreement with EU	- Usually lower contribution than FPA, but + possibly lower transaction costs	- Probably limited, similar to FPA – depends on landings	- Employment possibilities limited	- Limited support for management (only through licence fees) - Authorities lack control over vessels (dep. on agreement details)	+/- Environmental impacts not clear
Fishing agreement with other countries	- Usually lower contribution than FPA	+/- Depends on local landings.	- Limited employment; conditions usually worse than on EU vessels	+ May provide support (financial/in-kind) for management	+/- Environmental impacts not clear

6 Conclusions and Recommendations

6.1 Summary of Indicators

A summary of the inclusion of the qualitative 'presence' and 'absence' indicators considered above in the FPAs are given in Table 6-1. This gives an overview of the degree of comprehensiveness of including the measures introduced to help the FPAs in addressing the Council Conclusions.

The percentage inclusion for each indicator is calculated and presented in Table 6-1 as the proportion of FPAs it has been included in. For the percentage contribution given to support sustainable fisheries by the EU, and the amount allocated by the coastal state, these are given as an average of the actual percentage. A percentage score is also given for each country to illustrate to what extent the FPA has included each of the elements in the selected indicators. This does not illustrate all the possible indicators but it does give an idea of how the different agreements compare.

It demonstrates that there are a number of factors likely to promote the Council Conclusions which have been consistently written into the FPAs, for example:

- + a requirement for an ex-ante evaluation;
- + control on transshipments;
- + requirement for observers;
- + gear specifications;
- + defined fishing areas;
- + a Joint Committee;
- + a forum for discussing stock status; and
- + flexibility to reduce fishing opportunities.

Some of the other aspects are included less consistently, but in more than 50% of agreements including:

- + the exclusivity clause (although this is included in all agreements since 2004);
- + a ship-owner contribution of more than €35/tonne for tuna;
- + encouragement for joint ventures;
- + VMS requirements; and
- + a specific extra financial contribution for supporting sustainable fisheries.

Other aspects have been less consistently included including:

- evidence of effective limits to fishing effort by fishing power;
- limits on by-catch; and
- incentives or conditions for local landings.

At this stage and with the current information there are still uncertainties regarding:

- the extent to which fishing possibilities have been calculated based on a stock assessment;
- whether FPAs have encouraged or will encourage joint ventures in practice; and
- whether all the ex-ante evaluations have been shared with the coastal state prior to or during negotiations;
- effects on capacity to manage.

There are an encouraging number of positive inclusions to suggest many of the Council's concerns are likely to be addressed. There do remain, however, some outstanding sticking points.

Changes in the indicators between the current FPAs and the previous fishing agreements (FAs) are shown in Table 6.2. The percentage improvement for each indicator illustrates the proportion of agreements where the issue (reflected by the indicator) has been more effectively written into the agreement. The percentage improvement by country illustrates the proportion of indicators where there has been an improvement. In these calculations an improvement is counted as one; a slight improvement as half; and a deterioration results in subtraction of one.

The picture is slightly distorted as many of the more recent previous fishing agreements (2002 onwards) incorporated new partnership aspects in anticipation of the Council conclusions. However it illustrates that in some cases there have been improvements.

There has been an overall improvement in the structure of the agreements (by 38-61% on the criteria used – Table 6-2), which gives a reasonable possibility that many of the requirements of the Council are being met.

The main improvements have been:

- + undertaking of ex-ante evaluations;
- + inclusion of the exclusivity clause;
- + control on transshipments;
- + increased share of costs by the shipowners for tuna agreements; and
- + inclusion of a Joint Committee that meets at least annually.

Others that have improved in more than half of all FPAs reviewed include:

- VMS requirements;
- inclusion of a forum to jointly discuss stock status;
- contributions for sustainable fisheries;
- percentage allocation to supporting sectoral fisheries policy; and
- encouragement for joint ventures.

A number of other issues have not shown significant improvement as they may have already been written into the previous fisheries agreements. These include:

- gear specifications;
- definitions of fishing areas;
- observer requirements;
- flexibility to reduce or increase fishing possibilities;
- incentives for local landings; and
- support for local employment.

However, the presence of these aspects in the agreements does not necessarily mean they will be implemented in practice. Whether or not these aspects have been fulfilled in practice would be one of the objectives of a future impact assessment.

Table 6-1 Summary of presence or absence of issues within current FPAs

Objectives of the 2004 Council Conclusions	Country with FPA	Cape Verde	Comoros	Côte d'Ivoire	Gabon	Greenland	Guinea-Bissau	Kiribati	Madagascar	Mauritania	Micronesia	Morocco	Mozambique	São Tomé & Príncipe	Seychelles	Solomon Islands	Inclusion (%) for each
	Indicator																
Fostering Partnerships	Ex-ante evaluation undertaken	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	100%
	Ex-ante evaluation shared									✓			✓		x	✓	?
	Joint committee to jointly annually monitor agreement	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	100%
Contribution towards sustainable exploitation	Exclusivity Clause	✓	✓	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	✓	✓	x	87%
	Opportunities based on stock assessment	x	R(✓)	R(✓)	?	?	?	R(✓)	R(✓)	?	R(✓)	x	R(✓)	R(✓)	R(✓)	R(✓)	?
	Effort/Catch limits	x	x	x	x	✓	x	x	x	(✓)	x	(✓)	x	x	x	x	13%
	Biological recovery periods	NA	NA	NA	NA	?	x/✓	NA	NA	✓	NA	✓	NA	NA	NA	NA	83%
	Gear specifications	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	100%
	Defined fishing area	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	100%
	By-catch limits	x	x	x	x	x	✓	x	x	✓	x	✓	x	x	x	x	20%
	Allows reduction of fishing possibilities	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	100%
	Share of ship owner contribution =€35/t	✓	✓	✓	✓	NA	✓	✓	✓	✓	✓	x €25	✓	✓	x ³³ €25	✓	86%
Improve knowledge of fishery	Forum for discussion on stock status	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	100%
Contribution towards the elimination of IUU fishing	VMS Requirements	✓/x	✓/x	✓/x	✓/x	✓	x	✓/x	✓	✓	✓	✓	✓/x	✓/x	✓	x	63%
	Observer requirements	✓	✓	✓	✓	✓	✓/x	✓	✓	✓	✓	✓	✓	✓	✓	✓	97%
	Control on Transshipments	✓	✓	✓	✓	?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	97%
Support strategies for sustainable management	Contribution for sustainable fisheries	16%	x	24%	17%	x	0%*	15%	28%	13%	x	x	28%	15%	x/✓	x	53% (10%)
	% of contribution allocated to partnership actions	✓ 80%	✓ 60%	✓ 100%	✓ 60%	✓ 23%	✓ 35%	✓ 52%	✓ 80%	✓ 13%	✓ 18%	✓ 37%	✓ 100%	✓ 50%	✓ 36%	✓ 30%	100% (52%)
Facilitate integration of the state into the global economy	Encourage Joint Ventures	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓/x	✓	✓	✓	✓	90%
	Existence of Joint Ventures					✓							✓	?	x	x	?
	Incentives for local landings	✓	x	x	✓	x	x	x	✓	✓	x	✓	x	x	x	x	33%
	Local or ACP employment	✓*	✓	✓*	✓*	x	✓	✓*	✓*	✓	✓	✓	✓*	✓*	✓	✓	100%
%of indicators achieved/country		75%	68%	75%	75%	68%	69%	75%	83%	91%	70%	76%	81%	75%	69%	67%	

Note:

(✓) refers to catch limits for pelagic species only

R(✓) indicates stock assessments are done on a regional level (e.g. IOTC, WCPFC, ICCAT)

✓* refers to employment required for ACP nationals but not specifically for those from the coastal state

NA: Biological rest periods not relevant to tuna agreements as it is a migratory species

0%*: Guinea-Bissau does not receive an extra payment for implementation of a sectoral fisheries policy, but an extra €500,000 per year is paid to support SPS and potentially MCS measures, in addition to the financial contribution.

³³ Revision of the Seychelles FPA (2008) includes a shipowner contribution of €35 per tonne of tuna

Table 6-2 Illustration of improvements against selected indicators between FAs and FPAs

		Cape Verde	Comoros	Cote d'Ivoire	Gabon	Greenland	Guinea-Bissau	Kiribati	Madagascar	Mauritania	Micronesia	Morocco	Mozambique	São Tomé & Príncipe	Seychelles	Solomon Islands	% Improvement per indicator
Fostering Partnerships	Ex-ante evaluation undertaken	↑	↑	↑	↑	↑	↑	↑	↑	↑	--	↑	↑	↑	↑	--	100%
	Ex-ante evaluation shared									↑	--		↑			--	?
	Joint committee to monitor agreement (annually)	↑	↑	↑	↑	↑	→	↑	↑	↑	--	→	→	↑	↑	--	77%
Contribution towards sustainable exploitation	Exclusivity Clause	↑	↑	→	↑	↑	↑	↑	↑	↑	--	↑	↑	↑	↑	--	92%
	Effort/Catch limits	→	→	→	→	→	→	→	→	↑	--	↑	→	→	→	--	15%
	Biological recovery periods	→	→	→	→	→	↑→	→	→	→	--	→	→	→	→	--	4%
	Gear specifications	→	↑	→	→	→	↑→	↑	↑	→	--	→	↑→	→	↑	--	38%
	Defined fishing area	→	→	→	→	→	→	→	→	→	--	→	→	→	→	--	0%
	By-catch limits	→	→	→	→	↑	→	→	→	→	--	↑	→	→	→	--	8%
	Allows reduction of fishing possibilities	→	→	→	↑	↑	→	→	↑→	→	--	↑	→	↑	→	--	27%
	Share of ship owner contribution	↑	↑	↑	↑	?	↑→	→	↑	↑	--	→	↑	↑	↑→	--	73%
Improve scientific knowledge	Forum for discussing stock status	↑	↑→	→	↑→	↑	→	↑→	↑→	↑	--	↑	↑	→	↑	--	54%
Contribution towards the elimination of IUU fishing	VMS Requirements	↑	↑	→	↑	↑	→	→	↑	→	--	↑	→	→	↑	--	54%
	Observer requirements	↑	→	→	→	→	→	→	→	↑	--	↑	↑	↑	→	--	38%
	Control on Transshipments	↑	↑	↑	↑	→	→	→	↑	→	--	↑	↑	↑	↑	--	69%
Support strategies for sustainable management	Contribution for sustainable fisheries	↑	→	↑	↑	→	↑→	↑	↑	↑→	--	→	↑	↑	→	--	62%
	% contribution allocated to fisheries	↑	→	→	↓	↑	↑	↑	↑	↑	--	↑	→	↑	↑	--	54%
Facilitate integration of the state into the global economy	Support for Joint Ventures	↑→	→	↑	↑	→	↑	↑	↑	→	--	→	→	↑	→	--	50%
	Support for local landings	↑→	→	↓	↑	→	↓	→	↑	→	--	→	→	→	→	--	19%
	Local employment	↓	↑	↓	↑	→	↓	→	↓	→	--	→	↑→	↑→	→	--	23%
	% Improvement per country	53%	45%	21%	61%	45%	21%	34%	58%	48%	--	53%	45%	55%	38%	--	

Key



Improvement



Partial improvement



Remained the same



Deterioration

-- No previous agreement for comparison

? Information not available

6.2 Are FPAs likely to achieve their objectives?

FPAs show improvements over the FAs, and are making progress in addressing the 2004 Council Conclusions. They seem to be more responsible and transparent than many of the non-EU agreements. However, there are still a number of areas where initial improvements have been made and can be further capitalised on, and other areas that require further attention.

Implementing a partnership approach

Partnership:

- FPAs emphasise the partnership between the EU and the coastal state. The wording and emphasis has changed from the previous EU fisheries agreements to emphasise partnerships, transfer of knowledge and increasing investment opportunities.
- However, the fundamentals of the agreements remain the same: access to fisheries resources in exchange for financial contribution, and there is a feeling amongst partner states that the agreements are not much different in substance from the previous FAs.
- Tuna purse-seine agreements seem to provide a fair price at around 13% of catch value – some 10% would be a norm. This is more than most eastern Asian agreements, which are around 6%, although this is usually for longline catch which has a higher absolute value. The EU, however, pay only 1-2% for longline access but these are a very small component of overall EU effort. Mixed agreements are more difficult to assess but, in the case of Mauritania and Morocco, comparable prices are being paid in the FPAs as previously.
- Overall, the amount paid for access does not seem to have risen much through time although a constant rate over several years does provide a buffer from world price variations.
- There is little in the FPAs that directly fosters the national capacity for catching or processing fish. Whilst there are provisions for improving the investment climate and for joint ventures, there is no evidence yet whether such investment and support will materialise.

Transparency:

- The text of the EU FPAs is openly available in the public domain and all agreements, including fishing possibilities and financial contribution are available on the EU website. In this respect they are much more transparent than other comparable fishing access agreements, for which the details are rarely available.
- However, transparency of negotiations could be improved and the coastal states have not always had access to the ex-ante evaluations prior to or during the negotiation process.
- Coastal states should also seek to be transparent about fishing agreements with other distant water fishing nations, and the total effort in the fishery.

National sovereignty:

- The EU aims to develop a 'policy dialogue' with coastal states towards promoting sustainable fisheries and responsible management.
- However, there is concern amongst coastal states that the FPAs specify they must consult with the EU before making any changes to their national fisheries policy, which infringes on decisions over national issues.

Rational and sustainable exploitation of fisheries resources

- FPAs show improvements over the FAs in their potential to contribute to rational and sustainable exploitation of fisheries resources, through the inclusion of the

exclusivity clause which restricts overall EU effort, flexibility to revise fishing opportunities (and the financial contribution) in the light of scientific evidence, a good level of detail on gear restrictions, fishing zones and excluded areas, by-catch restrictions.

- However, there is little evidence that fishing opportunities are related to proper resource evaluation including stock assessment and valuation, particularly in mixed agreements. However, the trend away from mixed agreements and towards tuna agreements also improves the chances for sustainable exploitation as they will not be targeting heavily-fished coastal demersal stocks.
- Whilst fishing opportunities tend to be effort-limited, that effort is defined by GRT rather than power or other modifier of catching ability. Effort limitation needs to be more realistically defined and controllable to reduce risks of contributing to over-exploitation.
- Where effective fisheries management exists, FPAs or any fishing agreement should not pose a problem for sustainable exploitation. However, the lack of such management based on proper resource evaluation and effective effort or catch controls in most developing countries demonstrates that this is usually not the case. As a result, support for improving fisheries management is needed. This should not necessarily come through FPAs, rather it could come through broader based international development support.

Improve scientific knowledge of the fisheries

- FPAs partly address the need to improve scientific knowledge on the fisheries. Joint Scientific Committees, or scientific meetings linked with the Joint Committees, have been introduced into all FPAs, to allow for consultation on issues relating to the state of the stocks. However it is not yet clear how this forum will be used, and whether it may result in the EU pressurising the country (or countries) to accept its conclusions on the state of the stocks.
- The FPAs do not provide specific financial support for research to improve scientific knowledge of the fisheries in question, although funds may be directed towards this by coastal states from the financial contribution received for the agreement, but the lack of stock assessment capacity and expertise does mitigate against this.
- However, the majority of the FPAs, being tuna agreements, involve relatively low levels of financial contribution which would not cover the costs of a comprehensive stock assessment such as by the Fritjof Nansen.

Contribute towards the elimination of IUU fishing

- There is a clear commitment to combating IUU fishing in the FPAs. Most FPAs now include a VMS Protocol and all now provide for observers and control of transshipments. However, coastal states do not always implement observer schemes and vessels may leave the EEZ to tranship on the high seas. Whilst a VMS Protocol may exist in the FPA, some systems are not yet operational.
- There are still concerns about lack of compliance with the regulations by EU vessels, such as catch declarations and entry/exit notices. However, EU vessels particularly tuna seiners, are generally compliant compared to east Asian vessels.
- FPAs may contribute indirectly to combating IUU by non-EU fleets, through funding for MCS measures by the coastal state, and pressure by EU vessels to improve enforcement against other fleets.

Support strategies for sustainable management

- The restructuring of negotiated payments under FPAs can allow more scope for investment into sustainable fisheries. However, there is no guarantee that the funding for partnership actions will be any more successful in improving fisheries management as the funding for targeted actions was under the FAs.

- A higher proportion of the overall contribution is being directed towards funding actions in the fisheries sector in FPAs than in FAs, maximising benefits in the fisheries sector but limiting the impact on the wider development of the coastal state. However, because most FPAs are purely tuna agreements, the overall level of financial contribution tends to be lower than in mixed agreements.
- Periods when countries have **not** had a fisheries agreement with the EU have been associated with improvements in fisheries policy, management capacity, domestic fleet capacity and export revenues (e.g. Namibia, Mozambique).
- Improving fisheries management requires more than just financial contribution; technical support and more comprehensive programmes are required to support national fisheries development and management. This could be achieved through better synergy between FPAs and development cooperation.
- Financing for 'developing and implementing a sectoral fisheries policy' in the FPAs provides more flexibility to coastal states than the targeted actions in FAs did, but there are concerns amongst coastal states that they may not be allowed to use the money for their own policy objectives such as supporting local fisheries.

Integration of the state into the global economy

- The extent to which FPAs can contribute to helping coastal states integrate into the global economy is limited, as they deal with fisheries access. There is an increased emphasis on developing an investment climate, on the transfer of technology and know-how, and on joint ventures.
- The case studies show that the real benefit is not in the catching but the processing. There seems little partnership support in this direction, which would be understandable if this were purely a commercial agreement. There is also considerable variability in the specifications or actions in local employment or landings. All of these do not advance the role of the ACP countries in the global fish market.
- Other external factors, such as changes in tariff structures through World Trade Organisation negotiations, or Economic Partnership Agreements may have a much greater impact (negative or positive) on coastal states, overriding any potential gains to be made through FPAs.

Foster better global governance of fisheries at financial and political level

- Poor governance and corruption leave fisheries open to IUU fishing and financial contribution payments open to misappropriation. This will limit the impact that FPAs can have on improving fisheries management and contributing to sustainable fisheries.
- The FPAs themselves can have a limited impact on this, but by supporting sustainable management, and through monitoring the spend of financial contribution, may help improve global governance. For the EU to not contribute towards corruption and to be sure that the financial contribution is contributing towards improving fisheries management and governance, FPAs should only be signed with countries that have a good track record in governance and anti-corruption measures.

6.3 Are FPAs better or worse than the alternatives?

Fishing agreements and FPAs are an easy scape-goat for many of the problems faced by the fisheries sector in developing countries. The EU is a target of many NGOs partly because of the availability of the text of the agreements, which enables various interest groups to analyse their content in detail. EU vessels have certainly contributed to the over-exploitation of fisheries resources, yet Asian vessels, flag-of-convenience and IUU vessels have also contributed substantially to the over-exploitation of stocks in many waters.

Whilst the FPAs represent an improvement over the old FAs, some coastal states (e.g. Mauritania, Comoros, Mozambique) do not see them as substantially different, being predominantly commercial agreements supported by the EU.

Coastal states with fisheries resources that they cannot harvest themselves will make access rights available to others, either through access agreements with other countries, private licensing arrangements or joint ventures. Some coastal states have shown a reluctance to sign an agreement with the EU, preferring to develop their own fleet (e.g. Angola, where foreign vessels must now operate in association with Angolan enterprises and operate under the Angolan flag), provide private licensing arrangements for EU vessels (e.g. Senegal, where many of the vessels that previously fished under the FA are still active there, operating under private arrangements) or allow greater access to non-EU fleets.

At least in the medium term, there seems to be a place for EU FPAs, but it is worthwhile assessing the positive and negative aspects of them, compared to private arrangements, joint ventures and agreements with other countries, to identify where FPAs may be under threat and how they can be improved to better respond to the needs of developing coastal states. A summary is provided below.

FPAs vs EU private agreements with EU fishing associations:

- For coastal states – FPAs are better because the revenue is higher and more consistent.
- For the EU – FPAs are better because the EU has greater control over the agreement through the over-arching FPA framework, whereas private agreements vary in their detail and are less transparent.
- For the EU private sector – FPAs are better because they currently pay lower licence fees and the transaction costs of establishing the agreements are borne by the Commission.
- For EU consumers – FPAs are better because they may provide more accountability than private agreements, but the fish comes at a greater cost to the EU taxpayer.
- For EU taxpayers – in terms of value of raw material, the value for money for the EU taxpayer looks good in terms of per negotiated access tonnage but in terms of actual tonnage caught in relation to public outlay on the agreements, the benefits look more marginal compared to the option of buying on the world market.
- For the EU processing sector – there is no real difference between FPAs and private agreements; either way they receive a supply of raw material.

FPAs vs joint ventures with EU companies:

- For coastal states – FPAs may provide more government revenue, but less overall value-added and employment benefits, and probably less supply of fish for the domestic processing sector, where this exists.
- For the EU – FPAs may be better than joint ventures because vessels are subject to EU law, although joint ventures may imply cheaper operating costs because licence fees and standards for employment, safety and quality may be lower.
- For EU processors – FPAs are better as joint ventures do not guarantee a supply of fish for processing.

FPAs vs agreements with other countries:

- For coastal states – FPAs usually provide greater financial contribution than other countries, but there are also more conditionalities placed on them. Whether or not the agreement supports local processing through landings depends on the details of the agreement.

- For the EU – FPAs are clearly preferable than coastal states signing agreements with other countries, as they provide fishing opportunities for the EU fleet, securing employment and fish supply for the EU.
- For EU consumers – There may not be much difference between the two, as the reduction in fish supply would be made up by increased imports.
- For the EU processing sector – FPAs are preferable as they provide fish for processing, without which they may not be viable in competition with developing country processors.

6.4 Can FPAs contribute to sustainable fisheries?

FPAs have the potential to contribute to sustainable fisheries, but their impact is likely to be limited. There are other measures that may be more effective in promoting sustainable fisheries management rather than through agreements for fisheries access. In some cases, FPAs may actively work against the promotion of sustainable fisheries.

Once the negotiating process begins, neither the EU nor the coastal state has the incentive to come to the conclusion that there are no surplus stocks available for the EU to target: the EU wants access for their vessels; the coastal state wants the financial contribution that would come with the agreement. Given that coastal states with insufficient domestic fishing capacity to harvest their fishery resources will allow access to foreign vessels through agreements, joint ventures or licensing arrangements, the coastal state must limit fishing capacity to a level commensurate with the capacity of the fishery resources.

This underlines the need for effective management by coastal states, controlling fishing capacity, access by foreign fleets, and determining the distribution of benefits from the fishery (e.g. between artisanal and industrial, the distribution of revenues from the fisheries sector), and capturing value-added from the fishery.

The financial contribution that coastal states receive from FPAs can be used to finance fisheries management measures, running costs for fisheries administrations, as well as research and MCS activities. However, the targeted actions in FAs had limited impact on fisheries management in most cases, and financing for partnership actions under FPAs is not expected to be very different. Coastal states determine how the money is spent, and may or may not put it towards actions that would improve fisheries management.

Periods when countries have **not** had a fisheries agreement have been associated with improvements in fisheries policy, management capacity, domestic fleet capacity and export revenues (e.g. Namibia, Mozambique). By providing a guaranteed income, FPAs may not provide the necessary incentive to develop effective fisheries policies and do not support the coastal states' capacity to maximise value-added from the fishery.

Support for the fisheries sector in developing countries is necessary in addition to FPAs in order to improve fisheries management. More than just financial contribution from fisheries agreements is needed to improve fisheries management; technical support, research and expertise are needed. The fisheries sector in developing countries also needs increased investment, more value-added processing and trade opportunities, which is unlikely to be forthcoming through FPAs.

6.5 Do FPAs provide value for money?

For the EU, FPAs have a high benefit to cost ratio. The first sale value of the catch is greater than the financial contribution paid, and the agreements also provide employment

opportunities and secure the activities of the EU distant water fleet. Further substantial benefits are gained through value-added processing in the EU.

Despite this, in some agreements (FAs) there has been a high rate of non-utilisation of fishing opportunities, which represents poor value for EU taxpayers. Fishing opportunities in FPAs should be negotiated based clearly on demand from EU shipowners.

EU shipowners currently pay below market rates for licences under FPAs, independent of the tonnage of fish caught. They pay less than non-EU distant water vessels, and less than EU vessels fishing in the same waters under private agreements. The FPAs therefore represent good value for money for shipowners, but the costs could be more equally shared (or the benefits for coastal states increased) by increasing the price paid by the shipowners per tonne of tuna from the current maximum of €35 to €45 or €50.

For coastal states, FPAs provide a fair price for the tonnage of fish, compared to other licensing regimes and agreements with other countries. The EU usually pays more than non-EU distant water fleets. FPAs also provide a consistent and dependable income that can be budgeted for in national or sectoral plans.

The greatest potential for coastal states to generate revenue from fisheries is through value-added processing. FPAs provide limited support for this (although some countries, such as Seychelles and Cote d'Ivoire have succeeded in developing on-shore processing sectors). Because many EU vessels do not land locally, this limits the potential for value-added that the coastal state can gain from the fishery.

6.6 Are FPAs coherent with trade and development policies?

There are still coherence issues between external fisheries and development policies. As in a previous evaluation (ADE 2002), countries with FPAs are still found to not receive funding for fisheries in EU NIP country development programs, although they do appear in the regional programmes. There has been good synergy between regional EDF projects and fisheries, particularly in the MCS/IUU field. However, the amount of assistance dispersed per country can be quite low and therefore suggests there is an opportunity lost in development assistance when signing an FA/FPA, although coastal states must also identify fisheries as a priority for EDF funding. Whilst regional projects are good when it comes to control and management systems, they are less good at developing national capacity to catch and process fish, which is where the real benefits lie.

Although comments above suggest a lack of support in this field is a negative feature of partnership agreements, perhaps FPAs are not the vehicle of choice to deliver effective fisheries management systems. If EU delegations would encourage coastal states to include fisheries in their NIPs then development assistance might be a better way of achieving this and so truly facilitating integration into the global economy. EPAs may also be better shaped to help in this category than FPAs, although they are not expected to provide development assistance.

Coastal states have legitimate objectives to develop their own local fishing fleet, and processing capacity, which the FPAs do not support fully enough. Provisions in the FPAs for joint ventures and increased investment may help. However, because FPAs are at an early stage of implementation, so far there is no evidence of how or if this will become a reality. The FPAs focus more on tuna, rather than mixed agreements, where conflicts with local fleets and food security issues are less than for inshore demersal fisheries.

FPAs do not cover trade issues, dealing only with fisheries access. However, they may have an impact on ACP countries' trade, particularly exports. As a result, there may be

coherence issues between FPAs and trade policy where the latter aims to promote countries development through increased trade. FPAs tend to reduce coastal states' exports as EU vessels often tranship their catches or land directly to Europe (the exceptions are those countries that have processing capacity and where the EU vessels land e.g. Seychelles, Cote d'Ivoire). If the catches were landed locally and then exported to the EU, they would appear as exports from the coastal state and would contribute to that country's exports and foreign currency earnings.

One of the forthcoming trade instruments that will have an impact on ACP countries, is the regional Economic Partnership Agreements (EPAs). It is still not clear how fisheries issues will fit and EPAs, although there are no direct coherence issues between FPAs and EPAs, as the former deal with fisheries access and the latter with trade.

6.7 What are the gaps in knowledge and research needs?

FPAs are still at a very early stage of implementation, having been in force for a year at the most. As a result it has not been possible to fully assess their impacts. A further assessment of the impacts of FPAs should be carried out once they have been in force for a few years. In particular this should assess the impact on improving fisheries management capacity, and whether joint ventures and investment in the fisheries sector of coastal states have materialised, to support development of local fishing and processing capacity.

A fuller review of the ex-ante evaluations would be advisable, since only a limited number were available to the consultants for this study.

More research is needed into the conditions under which coastal states should develop their own fishing capacity and on-shore processing capacity in order to increase the value-added from their fishery resources. Whilst it is clear that the major benefits are to be gained through value-added processing, other global forces such as tariffs and competition from other processors such as China and Thailand, may impede the development of a viable domestic processing industry for some coastal states.

6.8 Summary of Recommendations

Effective fisheries management and good governance at the level of coastal states would ensure that FPAs provide the benefits that they potentially can, through financial contribution and local landings, and to ensure that potential negative impacts are minimised, such as over-exploitation, illegal fishing and conflicts with local fleets.

The perfect scenario of effective and sustainable fisheries management is a long way off even in many developed countries, and more so in developing coastal states. Recognising this, there are a number of ways in which the FPAs can be improved to start to address some of the key issues:

- Coastal states need a clear approach to how they will fully benefit from their fisheries resources. Developing their own effective fisheries management capacity is essential for this, including supporting institutions and value-added infrastructure especially on-shore processing where this is appropriate. They may require support to determine the best strategy to maximise economic rents from their fishery resources.
- FPAs should promote more definite mechanisms towards joint ventures and increase local landings to contribute more fully to increasing value-added for coastal states and the general sense of partnership. Joint ventures should maintain

transparency and conform to minimum standards that could be established, to ensure a fair deal for partner countries. Development assistance may be channelled into direct assistance in enhancing in-country capacity for management and for processing.

- Fishing opportunities under FPAs should be based on rigorous analyses of fisheries potential including stock assessment and valuation, together with more precise definitions of effort in agreements. The Marine Stewardship Council's certification approach, or FAO's ecolabelling guidelines, may provide useful frameworks for the development of rapid assessment criteria to indicate whether negotiations should proceed for a particular fishery.
- In order to improve fisheries management and knowledge of the stocks, technical assistance is needed in addition to funding for the fisheries sector. This may be better dealt with under development cooperation.
- Transparency of the negotiation process should be increased, including the availability of the full ex-ante evaluations for the coastal state. The ex-ante evaluations could be financed by an independent body to ensure their impartiality, and should more thoroughly address impacts and value-added for the coastal state.
- The part of the financial contribution for 'fisheries policy' should be determined based on identified needs of the fisheries sector; a review during the ex-ante evaluations could be used to provide advice towards policy development and management plans.
- EU shipowners should pay a higher price for their licence fees (per tonne of tuna), to bring it more into line with what EU vessels pay under private agreements.

6.8.1 Recommendations for the UK

- The UK as a Member State should engage in the preliminary discussions and negotiations concerning FPAs as far as possible, both in Europe and in-country, and in the Joint Committees and scientific meetings where appropriate, promoting an approach that takes into account the interests of developing countries, and maximises the potential benefits they can gain from their fisheries.
- DFID should prioritise technical support to help improve the effectiveness of fisheries management systems and increase the contribution that fisheries can make to economies and society in third countries.
- In this regard, UK, through DFID, should play an influencing role with other international donors both EU and external (including multilateral agencies such as the World Bank), in promoting coherent and effective fisheries development support programmes.
- Support ACP countries in building their capacity for negotiating access agreements and finding a balance between developing their own domestic fleet or providing access to foreign fleets.

6.8.2 Recommendations for the EU

- Sharing of data and information with ACP countries in a timely manner including ex-post and ex-ante reports which are based on data collected in ACP countries by EU-financed consultants.
- Demonstrate that EU fishing agreements can in practice provide a mutual benefit for both ACP states and the EU.
- Encourage more specific investment mechanisms in the fishing sector in ACP countries by EU companies.
- Increase clarity of the exclusivity clause in future agreements, both in its visibility in the agreements, and in its meaning/applicability;

- Work with DG DEV to maximise ACP state capacities using the new EDF ACP Fish II funds.

6.8.3 Recommendations for ACP/Developing countries

- Need for better stock assessments and data on fishery resources.
- Clarity concerning fisheries policy and the approach to extracting resource rent from the fisheries, including the role of industrial vs small-scale fisheries in the economy and food security.
- Strengthen control and monitoring of EU and other foreign fishing fleets.
- Improve data collection on fish landings, catch data and improve the integration of statistics relating to fisheries (macroeconomic data, trade and customs data, tax revenues).
- Develop policies for increasing the value-added that the fisheries sector can make to local economic and social development;
- Formulate capacity building projects for funding under the new EDF ACP Fish II programme.

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Annex 2: EU Fisheries Agreements Summary Matrices

Acronyms used:

Adv advance (payment)
FA Fisheries Agreement
FC Financial Contribution
FAD Fish Aggregating Device
FP Fisheries Policy

FPA Fisheries Partnership Agreement
GRT Gross Registered tonnage
GT Gross tonnage
LL Longline
MCS Monitoring, Control and Surveillance

P&L Pole & Line
QC Quality Control
SPC Secretariat of the Pacific Community
SSF Small-scale fisheries
Country codes according to Alpha-2 codes

A) FINANCIAL AGREEMENT

Country		Type of Agreement			Compensation / Contribution			Ship owner contribution (estimated) (€ m/year)	Funding for Targeted Actions			Fishing Possibilities									
	MS Benefitting	Date	Type	Fishery	Total (€ million)	No. years	Amount per year (€ m)		Amount (€ million /year)	% of total	Priorities	Crustacean (GRT)	Demersal trawlers (GRT)	Bottom Long-liners	Freezer tuna seiners	Surface long-liners	Pelagic vessels	Pole-and-line tuna vessels	Freezer fin-fish	Cephalopods	
Angola		1987 orig. agreement	FA					Tuna: ECU 20/t													
	ES PT FR IT GR IE	2000-2002	FA	Tuna, shrimp, demersal & pelagic	€ 27.95	2	€ 13.975 Based only on shrimp & demersal opportunities	Tuna: €25/t Est. total: Tuna: € 0.13 Shrimp & demersal: €1.15/month; €13.78/yr	4.025	28.8	Training, surveillance, research, QC, institutional support		Shrimp: 22 vessels (6550 GRT/month) (max catch 5000t/yr); Demersal: 3750 GRT/month		18	25	2				
	ES PT FR IT GR IE, NL	2002-2004	FA	Tuna, demersal, shrimp, pelagic	€ 31	2	€ 15.5 (FC: 9.975 TA: 5.525)	Tuna: €25/t Est. total: Tuna €1.125 Shrimp & demersal: €1.27/month' €15.18/yr	5.525	35.6	'Partnership' - Research, surveillance, artisanal fisheries, training, aquaculture.		Shrimp: 22 vessels (6550 GRT/month) (max. catch 5000t/yr); Demersal: 4,200GRT/mth		15	18	2				
		2006	Agreement derogated																		
Cape Verde		1990 (original agreement)	FA	Tuna, cephalopods, bottom LL				Tuna: ECU 20/t													
	ES	2001-	FA	Tuna &	2.04	3	0.68	Tuna:€25/t	0.28	41.2%	Scientific &			630 GRT/	37	62		18			

Country		Type of Agreement			Compensation / Contribution			Ship owner contribution (estimated) (€ m/year)	Funding for Targeted Actions			Fishing Possibilities									
	MS Benefitting	Date	Type	Fishery	Total (€ million)	No. years	Amount per year (€ m)		Amount (€ million /year)	% of total	Priorities	Crusta- cean (GRT)	Demersal trawlers (GRT)	Bottom Long-liners	Freezer tuna seiners	Surface long-liners	Pelagic vessels	Pole-and-line tuna vessels	Freezer fin-fish	Cephalo-pods	
	PT FR	2004 + 2005 extrn		demer- sals			(7,000t tuna)	Est. total: Tuna: €0.175- 0.24 ³⁴ Bottom LL: € 1.27 ³⁵			technical prog's, MCS, training, QC			month, averaged over year. 4 vessels at a time	vessels	vessels		vessels			
	ES FR PT	2006- 2011 Protocol 2006- 2011	FPA	Tuna	1.625	5	0.385 ³⁶ (5,000t tuna) FC:€0.33 FP:€0.06	Tuna: €35/t Est. total: €0.24 ³⁷	0.308	80%	Sectoral fisheries policy				25	48		11			
Comoros	ES FR IT PT	2001- 2004	FA	Tuna	1.05	3	0.35 (4,670t tuna)	Tuna: € 25/t Est. total: €0.12	0.21	60%	SSF; research institutional support; training; RFO				40	25					
	ES FR IT PT	2005- 2010 Protocol 2005- 2010	FPA	Tuna	2.34	6	0.39 (6,000t tuna) FC:€0.39 FP: €0	Tuna: €35/t Est. total: €0.17-0.21 ³⁸	0.234	60%	Fisheries policy for sustainable fisheries				40	17					
Côte d'Ivoire		1990	FA (orig. agreement)					Tuna: ECU 20/t													
	ES FR PT	2000- 2003 +extrn 2004	FA	Tuna & Demer- sals	2.87	3	0.9575 (8,500t tuna)	Tuna: €25/t Est. total: €0.233m ³⁹	0.6825	71.3	Institutional support, research, technical programmes		600 GRT/month		39	20		12			
	ES FR	2004- 2007	FA	Tuna & demer-	3.195	3	1.065 (9,000t)	Tuna: €25/t Est.total: €	1.065	100	Sectoral fisheries		1,300 GRT/month		34	11		3			

³⁴ €0.175 = shipowner payments for the 7,000t tuna provided for in the financial compensation. €0.24 = advance payments by shipowners if all tuna licence opportunities are taken up

³⁵ If all bottom longline opportunities are taken up each month

³⁶ €325,000 contribution for fishing opportunities and €60,000 for support of fisheries policy. 80% of total contribution allocated to support and implementation of initiatives in the context of the sectoral fisheries policy.

³⁷ €0.21m for the 6,000t tuna provided for in the financial compensation; €0.24 for advance licence payments if all opportunities are taken up.

³⁸ €0.17 = advance payments for all licence opportunities; €0.21 = payment for 6,000t tuna provided for under the financial compensation

³⁹ Estimated payment for full uptake of licences. If over 5,270t of tuna are caught, this will rise by €25 per tonne, up to 8,500t tuna.

Country		Type of Agreement			Compensation / Contribution			Ship owner contribution (estimated) (€ m/year)	Funding for Targeted Actions			Fishing Possibilities									
	MS Benefitting	Date	Type	Fishery	Total (€ million)	No. years	Amount per year (€ m)		Amount (€ million /year)	% of total	Priorities	Crustacean (GRT)	Demersal trawlers (GRT)	Bottom Long-liners	Freezer tuna seiners	Surface long-liners	Pelagic vessels	Pole-and-line tuna vessels	Freezer fin-fish	Cephalopods	
	PT			sals			tuna)	0.236m ⁴⁰			policy, MCS, research										
		2007-2013	FPA	Tuna	3.57	6	0.595 (7,000t tuna) FC:€0.455 FP:€0.14	Tuna: €35/t	0.595	100	Sectoral fisheries policy				25	15					
Equatorial Guinea		1984	FA orig. agreement	Tuna	0.54	3	0.18 (4,000t tuna)	Tuna: ECU 20/t Est. total: ECU 0.04-0.08							27						
		1987	FA Amendmnt	Tuna & demersals				Tuna: ECU 20/t					?		?			?			
	ES FR PT IT	2000-2001	FA	Tuna	0.32	1	0.32 (4,000t tuna)	Tuna: €20/t Est. total: €0.05-0.01	0.12	37.5%	Training, surveillance, small-scale fisheries, research				30	30		8			
Gabon	FR, ES, PT	1998-2001	FA	Mixed	2.02	3	0.67 (9,000t tuna)	Tuna: €25/t Est. total: €0.135	0.40	60%	Scientific techniques, surveillance, support institutions, international meetings				42	33					
	FR, ES, PT, GR	2001-2005	FA	Mixed	5.05	4	1.263 (10,500t tuna)	Tuna: €25/t Est. total: €0.33-0.46	0.884	70%		1200GRT (crustaceans & cephalopods)			38	26					
	FR, ES, PT,	2005-2011 Protocol 2006-2011	FPA	Tuna	5.16	6	0.86 (11,000t tuna) FC:€0.72 FP:€0.15	Tuna: €35/t Est. total: €0.14	0.516	60%	Sectoral fisheries policy				24	16					

⁴⁰ Based on advance payments for all tuna licences, and uptake of full available tonnage for demersal vessels. If over 4,225t tuna are caught, this contribution will rise by €25 per tonne.

Country		Type of Agreement			Compensation / Contribution			Ship owner contribution (estimated) (€ m/year)	Funding for Targeted Actions			Fishing Possibilities									
	MS Benefitting	Date	Type	Fishery	Total (€ million)	No. years	Amount per year (€ m)		Amount (€ million /year)	% of total	Priorities	Crustacean (GRT)	Demersal trawlers (GRT)	Bottom Long-liners	Freezer tuna seiners	Surface long-liners	Pelagic vessels	Pole-and-line tuna vessels	Freezer fin-fish	Cephalo-pods	
Gambia	EC (no MS specified)	1990-1993	FA	Mixed	4.11	3	1.37	Tuna: €20/t Est. total: €1.38 (Tuna: € 0.045 Other: € 1.34)	0.082	6%	Scientific programmes Training, participation in regional & international meetings.	Fresh: 570 GRT 'freezer trawlers': 4400GRT	Fresh fish: 2000GRT (max. 1000 days)		40	8		17	Other spp: 10300GRT (4000 days)		
	EC (no MS specified)	1993-1996	FA	Mixed	1.4	3	0.47	Tuna: €20/t Est. total: €0.295 (Tuna: € 0.024 Other: € 0.27)	0.1	21.3%		'Shrimp freezer trawlers': 2000GRT	410GRT (Max 1000 days)		23			7	Other spp: 750GRT (4000 days)		
Greenland		2007-2012	FPA	Mixed	85.84 (+9.24) ⁴¹	6	14.31 (+1.54)	Based on 5% of live weight price per tonne Est. total: €3.55	3.26 Plus 0.5 & 0.1 & 0.19	23% (28%)	Sectoral fisheries policy; Institutional; training; Cod studies	Cod: 3,500 t; Pelagic redfish: 8,000 t; Greeland Halibut: 10,000 t; Shrimp: 11,000 t; Atlantic Halibut: 1,400 t; Capelin: 55,000 t; Snowcrab: 500 t; By-catches: 2,300 t. (Quotas for cod, pelagic redfish & by-catches vary by year; these are the quotas for the 2009-2010 period)									
Guinea		1983	Orig. agree- ment	Shrimp & tuna	2.3	3	0.77	Tuna: ECU 20/t Est. total: ECU 0.31 (Tuna ECU 0.01; Other ECU 0.3)	0.067	8.7%	Scientific programmes	3,000 GRT (Trawlers and shrimp boats, max. 25 vessels at any one time)			25 ocean-going freezer tuna boats	25 wet tuna liners					
	ES FR IT GR, PT	2000-2001 +02 +03	FA	Shrimp, tuna, finfish, cephalo pods	6.66	2	3.33 (FC: 1.6 TA: 1.7)	Tuna: € 25/t Est. total:€0.77m (Tuna: €0.1 Other: €0.66)	1.73	52%	MCS, inst. support, sci programmes, training, etc.		Shrimp trawlers: 1,500 GRT		38 vessels	16 vessels		14 vessels	2,500 GRT		
	ES FR GR IT PT	2004-2008	FA	Shrimp, tuna, finfish & cephalo -pods	19.98	5	3.4 increasing to 4.25	Tuna: € 25/t Est. total: € 1.2 (Tuna: € 0.1 Other: € 1.08) ⁴²	1.4 increasing to 1.95 Plus €0.8m for 2 MCS vessels	41%	Sustainable management of fish stocks (see targetted actions for details)		1,500 GRT (Shrimp trawlers) per month, averaged over year		34	9		14	2004: 2,500GRT 2005: 3,000GRT 2006: 3,500GRT 2007: 3,500GRT 2008: 3,500GRT		

⁴¹ Extra reserve is for cod and capelin actually made available by Greenland beyond those set out in the fishing opportunities

⁴² Average licence fee payments each year, assuming that all fishing opportunities are taken up, and assuming that the foreseen increases in fishing opportunities are realised.

Country		Type of Agreement			Compensation / Contribution			Ship owner contribution (estimated) (€ m/year)	Funding for Targeted Actions			Fishing Possibilities									
	MS Benefitting	Date	Type	Fishery	Total (€ million)	No. years	Amount per year (€ m)		Amount (€ million /year)	% of total	Priorities	Crustacean (GRT)	Demersal trawlers (GRT)	Bottom Long-liners	Freezer tuna seiners	Surface long-liners	Pelagic vessels	Pole-and-line tuna vessels	Freezer fin-fish	Cephalopods	
Guinea Bissau	ES, IT, PT, FR, GR (2007 extn: IT, ES, PR, GR)	2001-2006 + 2007 extension	FA	Mixed	50.0	5	10.0 Revised 2004: 7.26	Tuna: €25/t Est. total: €3.37 (Tuna: €0.1 Other: €3.3) 2004 revision: Est total: € 2.2 (Tuna €0.1 Other €2.1)	1.0	10%	See targetted actions	9,600GRT (shrimp) Revised 2004: 4,400GRT			40	36 (inc P&L) Revised 2004:30		See LL	2,800 GRT Revised 2004: 4,400 GRT		
		2007-2011	FPA	Mixed	28	4	7	Tuna: €35/t (PS & LL); €25/t (P&L)	2.45 0.5	35%	Fisheries policy & €0.5m for SPS & MCS	4,400 GT/yr				23		14	4,400 GT/yr		
Kiribati	ES FR PT	2003-2006	FA	Tuna	1.378	3	Yr1: 0.546 ⁴³ (8,400t) Yrs 2&3: 0.416 (6,400t)	Tuna: €35/t Est. total: €0.13-0.29 ⁴⁴	0.1	21.8%	Participation in regional & international orgs, institutional support				Yr1: 6 Yr2: 4-11	Yr1: 12 Yr2: 12					
	ES	2006-2012	FPA	Tuna	2.868	6	0.478 (6,400t tuna) FC: 0.416 FP: 0.062	Tuna: €35/t Est. total: €0.2 ⁴⁵	Yr1: 0.14 Yr2: 0.19 then 0.29	Yr1:30% Yr2:40% then 60%					4	12					
Madagascar	ES FR IT PT	1998-2001	FA	Tuna	2.280	3	0.76 (9,500t tuna)	€20/tonne Est. total: €0.12 – 0.19 ⁴⁶	0.456	60%	Research, MCS, institutional support, traditional fishing				45	30					
															For 9,500 t tuna						

⁴³ Plus €65 per tonne caught in excess of 8,400t in the first year, and in excess of 6,400t in the 2nd and 3rd years

⁴⁴ Minimum value is the advance payment for 12 longline licences and 4 purse seiner licences, maximum value is the payment for 8,400t tuna (allowance)

⁴⁵ Shipowner payments for the 6,400t tuna allowance. No information available about licence costs (advance payments)

⁴⁶ €0.12m = advance payments for licences, €0.19m = shipowner payments for the full allowance of 9,500t tuna

Country		Type of Agreement			Compensation / Contribution			Ship owner contribution (estimated) (€ m/year)	Funding for Targeted Actions			Fishing Possibilities									
	MS Benefitting	Date	Type	Fishery	Total (€ million)	No. years	Amount per year (€ m)		Amount (€ million /year)	% of total	Priorities	Crustacean (GRT)	Demersal trawlers (GRT)	Bottom Long-liners	Freezer tuna seiners	Surface long-liners	Pelagic vessels	Pole-and-line tuna vessels	Freezer fin-fish	Cephalopods	
	ES FR IT PT	2004-2006	FA	Tuna	2.48	3	0.825 (11,000t tuna)	€25/tonne Est. total: €0.098 – 0.275 ⁴⁷	0.505	61%	See targetted actions				40	40					
															For 11,000 t tuna						
	Detailed documents not yet available	2007-2012	FPA	Tuna	5.94	6	0.99 FC: €0.715 (11,000t tuna); FP:€0.28	€35/t tuna Est. total: €0.385 ⁴⁸	0.792	80%	Sustainable fisheries through national fisheries policy				44	44					
	Detailed documents not yet available	?-2012	FPA	Tuna	7.182	6	1.197 (13,000t tuna) FC:€0.8645 FP:€0.3325	€35/t tuna							43	76 (>100GT: 50; <100GT: 26)					
Mauritania	ES PT FR IT	2001-2006	FA	Mixed	430	5	86	Est. total: €12.4-13.2	4	4.6%	Research, surveillance, institutional	6200 GRT//yr	16,800 GRT/yr (incl. bottom LL and vessels other than trawlers)		36	31 Incl. P&L (increase to 35 in 2005)		See LL	15 Pelagic freezer trawlers (2005: 25)	55 (16,500 GRT/yr) (Decrease to 50 in 2005)	
	ES, IT, PT, GB, MT, GR, FR, NL, LT, LV, DE, PL	2006-2012 Protocol 2006-2008	FPA	Mixed	172	2	86	Est. total: € 22	11	13%	Implement national fisheries policy	10,040 GT/yr	6,674GT/yr (incl. bottom LL and vessels other than trawlers)	See demersal trawlers	36	31 (incl. P&L)	15,000 GT/mth (non-freezer vessels)	See LL	22 Pelagic freezer trawlers	43 (18,600 GT/yr)	
Mauritius	FR,ES, PT IT,GB	1999-2002 +2003	FA	Tuna	1.24	3	0.41 (5,500t tuna)	Tuna: €25/t Est. total: €0.12-0.14 ⁴⁹	0.275	50%	Scientific/technical programmes;				43	40		25GRT/month (referred)			

⁴⁷ €0.098 = advance licence payments for 40 seiners and 40 longliners less than 150GRT; €0.275 = shipowner payments for 11,000t tuna

⁴⁸ If all licences are taken up / shipowner contribution for 11,000t tuna

⁴⁹ €0.12m for advance licence payments, €0.14m for 5,500t allocation of tuna

Country		Type of Agreement			Compensation / Contribution			Ship owner contribution (estimated) (€ m/year)	Funding for Targeted Actions			Fishing Possibilities									
	MS Benefitting	Date	Type	Fishery	Total (€ million)	No. years	Amount per year (€ m)		Amount (€ million /year)	% of total	Priorities	Crustacean (GRT)	Demersal trawlers (GRT)	Bottom Long-liners	Freezer tuna seiners	Surface long-liners	Pelagic vessels	Pole-and-line tuna vessels	Freezer fin-fish	Cephalopods	
		extrn									MCS; manag. information system; training, study and int. meetings							to as 'fishing by line')			
	ES, FR, PT, IT, GB	2003-2007	FA	Tuna	1.95	4	0.49 (6,500t tuna)	Tuna: €25/t Est. total: €0.14-0.16	0.195	40%					41	49					
Micronesia (Fed. States of)	ES FR PT	2006-2015 Protocol 2006-2009	FPA	Tuna	1.68	3	0.559 ⁵⁰ , (8,600t tuna) FC:€0.56 FP: €0	Tuna:€35/tonne Est. total: €0.14-0.3 ⁵¹	0.1	18%	Sectoral fisheries policy				6	12					
Morocco	ES PT FR GR	1995-1999	FA	Mixed	500	4	125 (Varies)	Tuna: ECU20/t Est. total: ?	36.25 (average)	29%	Strengthen scientific research and implement a policy	150-113 shrimp – progressive reduction	50: Black hake [5: Sponge fishing]	174-140 (Progressive reduction)			Small scale & seiners: 83	27 (total tuna vessels)	12: Pelagic mid-water trawlers	128 – 68 (progressive reduction)	
	ES, FR, PT, DE, LT, LV, NL, IE, PL, GB	2006-2010 Protocol 2006-2010	FPA	Mixed	144.4	4	36.1 FC:€36.1 FP: €0	Tuna: €25/t Est. total: € 3	13.5	37%	Implementing sectoral fisheries policy	-	22 demersal vessels (with max 11 trawlers/yr)	30 (Plus 20 for gears targeting croaker & sparidae)	-	-	20 small-scale vessels Industrial quota 60,000t	27 (Seiners & P&L)	-	-	
Mozambique	ES FR PT GR IT	2004-2007	FA	Shrimp & Tuna	12.27	3	4.09 (8,000t tuna)	Tuna: €25/t Est. total: €0.126-0.8 ⁵²	4.09	100%	Institutional development, surveillance, research, training, QC	10 vessels 1,000 t quota deep-water shrimp			35	14					
	Council Regulation not available	2007-2011	FPA	Tuna	4.5	5	0.9 (10,000t tuna) FC:0.65	Tuna: € Est. Total ~€0.3	0.9	100%	Promotion of sustainable & responsible fishing				44	45					

⁵⁰ From the second year, this will increase by €65,000 for each additional purse seine vessel licence.

⁵¹ €0.14 = advance payments for licences; €0.3 = shipowner contributions for 8,600t allocation of tuna

⁵² €0.126m = advance licence payments for tuna; €0.8m = shipowner contributions for 8,000t tuna allocation and 1,000t shrimp quota

Country		Type of Agreement			Compensation / Contribution			Ship owner contribution (estimated) (€ m/year)	Funding for Targeted Actions			Fishing Possibilities								
	MS Benefitting	Date	Type	Fishery	Total (€ million)	No. years	Amount per year (€ m)		Amount (€ million /year)	% of total	Priorities	Crustacean (GRT)	Demersal trawlers (GRT)	Bottom Long-liners	Freezer tuna seiners	Surface long-liners	Pelagic vessels	Pole-and-line tuna vessels	Freezer fin-fish	Cephalopods
							FP:0.25													
São Tomé & Príncipe		1984 (original agreemt)	FA	Tuna +	0.54	3	0.18 (4,000t tuna)	Tuna: ECU20/t (min. adv ECU40,000)							27					
	ES FR PT	2002-2005 +2006 extn	FA	Tuna +	2.25	3	Yr1: 0.975 Yrs 2&3: 637.5 (8,500t tuna)	Tuna: € 25/t Est. total: €0.29-0.34	Yr1: 0.42 Yrs2&3: 0.255	41.3%		3 vessels <250 GRT for experimental fishing			36	25		2		
	ES FR PT	2006-2010	FPA	Tuna	2.652	4	0.663 (FC: €0.5525 (8,500t tuna) FP:€0.1)	Tuna: €35/t Est. total: €0.3	0.331	50%	Sustainable fisheries				25	18				
Senegal	GR ES PT FR	1997-2001	FA	Mixed	48	4	12	Tuna: P&L: €10/t Seiners: €20/t LL: €46/t Est. total: €7 ⁵³	6 (in theory)	50% but never allocated ⁵⁴	Support national fisheries sector	29 (4119 GRT) not lobster	5,881GRT (21 vessels) ⁵⁵ Plus 22 freezer trawlers (max 6 at a time)		41	23		12		Included in inshore demersal trawlers
	ES, FR, PT, IT, GR	2002-2006	FA	Mixed	64	4	16	Tuna: P&L: €15/t Seiners: €25/t LL: €48/t Est. total: €1.7-1.9 ⁵⁶	3.0	19%	'Partnership' Resource monitoring; MCS; training; institutional support;	3,500GRT /month (not lobster)	4,500GRT ⁵⁷	See demersal trawlers	39	23		16		Included in inshore demersal trawlers

⁵³ Licence fee payments for non-tuna vessels not available

⁵⁴ see ADE 2002. Evaluation of the Relationship between Country Programmes and Fisheries Agreements. Senegal Case Study.

⁵⁵ Inshore: 3 vessels (331GRT); Inshore + landing: 7 vessels (1,800GRT); Deep-water: 11 vessels (3,750GRT)

⁵⁶ Licence fees increase throughout the 4 years of the protocol. €1.7m = advance payments for seiner, longline and demersal licences at year 1 prices; €1.9m = €1.7m = advance payments for seiner, longline and demersal licences at year 4 prices

⁵⁷ Inshore: 1,500GRT/quarter; deep-water: 3,000GRT/month (includes bottom LL)

Country		Type of Agreement			Compensation / Contribution			Ship owner contribution (estimated) (€ m/year)	Funding for Targeted Actions			Fishing Possibilities									
	MS Benefitting	Date	Type	Fishery	Total (€ million)	No. years	Amount per year (€ m)		Amount (€ million /year)	% of total	Priorities	Crustacean (GRT)	Demersal trawlers (GRT)	Bottom Long-liners	Freezer tuna seiners	Surface long-liners	Pelagic vessels	Pole-and-line tuna vessels	Freezer fin-fish	Cephalopods	
											small-scale										
Seychelles	ES FR PT IT, GB	2002-2005	FA	Tuna	10.38	3	3.46 (46,000t tuna)	Tuna: € 25/t Est. total: €0.44-1.15	1.16	33.5%	MCS; research; training; small-scale				40	27					
	ES FR PT IT	2006-2012 Protocol 2005-2011	FPA	Tuna	24.75	6	4.125 (55,000t tuna)	Tuna: €25/t Est. total: €0.6-1.4 ⁵⁸	1.485	36%	Sectoral fisheries policy				40	12					
	Detailed documents not available	Revision 2008					5.335 (63,000t tuna)	Tuna: €35/t													
Solomon Islands	ES FR PT	2006-2009	FPA	Tuna	1.2	3	0.4 (6,000t tuna)	Tuna: €35/t Est. total: €0.08–0.21 ⁵⁹	0.12	30%	Sectoral policy				4	10					
															For 6,000t tuna/year						

⁵⁸ €0.6m = advance payments for licences; €1.4 = shipowner contributions for 55,000t tuna. If more than 55,000t are caught, this figure will rise (by €25/t).

⁵⁹ €0.08m = advance payment for max. no of licences allowed; €0.21m = shipowners' payment based on catching full quota of 6,000 t tuna. If

B) AGREEMENT CONDITIONS

Country	Date	Technical measures								Support to Local Economy			Detailed budget for Targeted Actions(€ million/year)							
		Biological recovery Period	Gear specification	Fishing zone	Scientific observers	Inspections & monitoring	Transhipment	By-catch limits	Joint Scientific Comm	Local landings	Local crew	Use of local services	Small-scale/local fisheries	Scientific support	Studies & TA	Training	Part. in int. meetings	Institutional support	MCS	Conservation
Angola	1987	--	--	Shrimp fishing: >12nm and N of 12°20'S; Tuna: >12nm.	--	Catch reports to be sent to Ministry. Communicate position.	Only in specified bays in presence of authorities.	Shrimp bycatches belong to Angolan authorities, should be landed	JC meets annually	Yes Bycatch from shrimp fishing must be landed	Yes Shrimp vessels to employ two Angolan nationals on board	To be used wherever possible (except tuna vessels).								
	2000-2002	Shrimp may be subject to biological rest period	Shrimp: 40mm, then 50mm after 1/3/01; Demersal: 110mm.	>12nm (demersal vessels not trawlers: 8nm); Shrimp: N of 12°20'S; Trawlers: N of 13°S.	Yes Shipowners pay €15/day for observer	Report catches & position; Satellite monitoring to be agreed	Only in specified bays	Bycatches from shrimp fishing belong to shipowners		If possible: LL should try to supply Angolan canneries	Yes Except tuna & pelagic vessels, at least 6 Angolans (inc. observer where requested).	Local agent; Fuel & water from Angola where possible (except tuna), use national airline.	0.15	0.75	QC: 0.35;	1.5		0.5	0.775	
	2002-2004	Shrimp may be subject to a biological rest period	Shrimp: 50mm; Demersal: 110mm; Pelagic: 60mm	Beyond 12nm; Shrimp: N of 12°20'S; Trawlers: N of 13°S.	Yes Shipowners pay €15/day for observer	VMS; Report catches & position. Customs check before leaving (except tuna).	Only in specified bays	Shrimp bycatches are the property of the shipowners	Joint scientific meeting (annual)	If possible: Tuna vessels should try to supply Angolan canneries	Yes. As for 2000-2002. + 20 trainee seamen/yr	Vessels must have a local agent; Vessels (except tuna) will be able to obtain fuel in Angola	1.15	0.75	QC: 0.35; Marketing: 0.25; Aquaculture: 0.25	1.5		0.5	0.775	
Cape Verde	1990	--	Live bait: 16mm Cephalopods: 40mm	P&L: >6nm live bait & bottom LL: from baselines; Cephalopods: all zones	Yes On vessels > 150 GRT, on request of Cape Verdean authorities	Catches to be reported; position to be communicated every 3 days		Tuna vessels to provide part of bycatch at local prices, if landed in Cape Verde	JC	If possible: Vessels 'shall, wherever possible' contribute to supplying canning factories	Yes Total of 13 nationals across whole EC fleet	Encouraged but no obligation								
	2001-2004 + 05	--	Live bait: 16mm; Tuna: ICCAT standards	Seiners & LL: >12nm P&L & Bottom LL: >6nm Live bait: from baselines	To be taken on board when indicated by authorities	Report catches; Communicate position every week	LL land 5% for transhipment	Not mentioned	JC meets on request	Yes LLs land 5% of catch for transhipment. Vessels should land to supply canning factories	Yes Total of 10 national across whole EC fleet	To be used where prices and quality are equal		0.05		0.02	0.03			0.18 (quality control)
	2006-	--	ICCAT	> 12nm	Yes	Report			JC, meets	Yes - Licence	Yes	Landings								

Country	Date	Technical measures								Support to Local Economy			Detailed budget for Targeted Actions(€ million/year)								
		Biological recovery Period	Gear specification	Fishing zone	Scientific observers	Inspections & monitoring	Transhipment	By-catch limits	Joint Scientific Comm	Local landings	Local crew	Use of local services	Small-scale/local fisheries	Scientific support	Studies & TA	Training	Part. in int. meetings	Institutional support	MCS	Conservation	
	2012		measures apply		At request of RFO. RFO pays salary.	catches. Satellite monitoring to be implemented. Communicate entrance /exit			annually. Scientific meeting where necessary	fee reduced by €5/t landed in Cape Verde; further €5/t reduction if sold to Cape Verde processing factory	Yes Total of 13 ACP seamen (inc. Cape Verde nationals) across the EC fleet	encouraged by reduced licence fee									
Comoros	2001-2004	No	No	Excluded zones given	Yes - If requested by Comorian Ministry	Allow inspection		Not mentioned	JC +/-	Not mentioned	Not mentioned	Give consideration when transshipping	0.126	0.0316 Inc. inst support		0.05265		✓			
	2005-2010	No	IOTC gear measures	Excluded zones given	Can be requested by Comorian Ministry	Permit if landing or transshipping. VMS to be implemented	Only in Comorian ports	Not mentioned	JC (meets annually)	Not mentioned	Yes 1 seaman							✓			
Côte d'Ivoire	1990	No	Shellfish & cephalopod trawler: 40mm; Fish trawlers: 60mm; Tuna:ICCAT standards	LL, P&L, trawlers: >6nm (exc. P&L live bait); Seiners: >200m isobath.	Yes.	Catch records/logbooks to be sent to authorities; communicate entering & leaving;		Tuna vessels landing should make by-catch available	JC meets on request	If possible: Tuna vessels shall contribute to supplying canneries.	Yes <250GRT: 1 >250GRT: 2 Tuna seiner fleet: 30; P&L fleet: 8; LL fleet: 15										
	2000-2003 + 2004 extrn	No	Crustaceans: 40mm; Cephalopods: 70mm; Fish: 60mm; Tuna: ICCAT standards	P&L, LL: >12nm (except P&L for live bait); Trawlers: >6nm; Seiners: >200m isobath;	Yes when requested. Trawlers pay €4/GRT/yr, tuna boats pay €10/day	Catch records/ logbooks to be sent to authorities; communicate entering & leaving		Tuna vessels landing should make by-catch available	JC meets on request	Contribute to supplying canneries	<250GRT: 1 250-300GRT:2 >300GRT: 3 Tuna seiner fleet: 30; P&L fleet: 4; LL fleet: 4; + trainees			0.09	0.25	0.05 + 0.0325 (contrib to international orgs)		0.11 + 0.05 (policy)	0.1		
	2004-2007	No	Crustaceans: 40mm; Cephalopds: 70mm; Fish trawlers: 60mm Tuna: ICCAT	LL, P&L: >12nm; Trawlers: >6nm; (P&L live bait fishing permitted < 6nm).	Yes, when requested. Trawlers pay €3/GT/yr, tuna boats pay €10/day	Catch records/logbooks to be sent to authorities; communicate entering & leaving;		Tuna vessels landing should make by-catch available	JC & Joint Scientific Committee meet annually	Contribute to supplying canneries	Social & Exclusivity clauses. Seiner fleet:30; LL fleet:4; P&L fleet:4; Trawlers			0.2	0.1 (stats)			0.485	0.28 (inc. VMS)		

Country	Date	Technical measures								Support to Local Economy			Detailed budget for Targeted Actions(€ million/year)							
		Biological recovery Period	Gear specification	Fishing zone	Scientific observers	Inspections & monitoring	Transhipment	By-catch limits	Joint Scientific Comm	Local landings	Local crew	Use of local services	Small-scale/local fisheries	Scientific support	Studies & TA	Training	Part. in int. meetings	Institutional support	MCS	Conservation
			standards								<460GT:1; 460-550GT:2; >550GT:3									
	2007-2013	No	ICCAT measures	>12nm	Yes, on request of regional authorities	Entry/exit notices; catch declarations; VMS to be established	Only in ports	No	JC (meets annually) Scientific meeting where necessary	--	20% of seamen embarked during campaign to be ACP	--								
	1984				Yes, on request	Communicate result of each haul by radio.			JC meets annually	Exclusivity clause? Specifies that EC shall participate in development projects, without prejudice to Lomé financing										
Equatorial Guinea	1987 amendment	No		Trawlers: >6nm		Catch statements, seiners radio results of each haul				Yes. Trawlers must land 4-6000kg fish/yr, otherwise fined	<300GRT: 1 >300GRT: 2	--								
	2000-2001			>4nm		Communicate entering & leaving, position and catch every 3 days				No (b/c no trawlers in this protocol)	No (b/c no trawlers in this protocol)	--	✓	0.017		0.047			0.057 ⁶⁰	
Gabon	1998-2001	No	No	Beyond 12nm.	May be requested by authorities	Not mentioned		Not mentioned	JC	Not mentioned	Not mentioned	Not mentioned		0.67	0.035		0.016	0.118	0.015	
	2001-2005	6-12nm & Jan-Feb for inshore shrimp trawlers	Crustaceans 40mm; Cephalopods: 60mm	Tuna vessels: >12nm. Trawlers: >6nm	May be requested by authorities	Yes		Not mentioned	JC (meets on request)	Not mentioned	Not mentioned	Encouraged for trans-shipping, supplies and services	0.53 (training) + 0.44 (private sector)	0.141	0.7		0.80 (inc contribs to int orgs)	0.22	0.22	0.53 (QC)
	2005-2011	ICCAT recommendations	ICCAT recommendations	Tuna vessels: >12nm	Yes	Yes. VMS to be implemented		Not mentioned	JC (annual) Scientific meeting	Financial incentives	Yes 20% ACP origin	Yes (e.g. agent for licence)			(NB also specified that Gabon gov will contribute 60% to fisheries sector)			0.145		

⁶⁰ Includes support for non-industrial fishing

Country	Date	Technical measures								Support to Local Economy			Detailed budget for Targeted Actions(€ million/year)							
		Biological recovery Period	Gear specification	Fishing zone	Scientific observers	Inspections & monitoring	Transhipment	By-catch limits	Joint Scientific Comm	Local landings	Local crew	Use of local services	Small-scale/local fisheries	Scientific support	Studies & TA	Training	Part. in int. meetings	Institutional support	MCS	Conser-vation
									where necessary											
Gambia	1990-1993	No	Live bait: 8mm Cephalopods: 40mm	≤250GRT: >7nm; >250GRT: >12nm;	Not mentioned	Not mentioned		Not mentioned	No	Obligated 30 kg/GRT/ year (without charge)	Yes Trawlers: 1 local seaman per vessel	Not mentioned		0.027		0.055				
	1993-1996	No	Fin fish: 60mm Shrimp: 40mm Tuna: ICCAT standards	Tuna vessels: all Gambian waters.	Not mentioned	Not mentioned		Not mentioned	No	Obligated 30 kilos per GRT/ year (without charge)	Yes Trawlers: 1 local seaman per vessel	Not mentioned		0.027		0.073				
Greenland	2007-2012		Technical conservation measures to be communicated to shipowners	>12nm	Yes, under Greenland law	VMS Protocol	Not mentioned – national law applies	Yes	JSC and JC (meet annually)	--	--	--								
Guinea	1983		Trawlers: 60mm; Shrimp: 25mm	Yes, dep on vessel. Shrimp boats <135GRT: >3nm.						Yes Licence fee reductions if land catch	Yes Trawlers >200GRT: ¼ crew Guinean Trawlers <200GRT: 1 Seiners: 2 LL fleet: 8			0.067						
	2000-2001 +02 +03		Shrimps: 40mm; Cephalopods: 60mm; Finfish: 70mm; Live bait: 16mm	All vessels >10nm.	Yes On each trawler and when indicated on tuna seiners and LLs.	Send catch declaration; Onboard inspections; Communicate entrance/ exit		Limits established for finfish, shrimp and cephalopod vessels (betw 9%-35%)		Yes- Trawlers to land 200kg per GRT per year free of charge, or pay an extra €30/GRT	Yes-Trawler <200GRT: 2; 200-350GRT: 3; >350GRT: 4; Seiner fleet: 6; P&L fleet: 5 LL: 2/vessel	Must have local agent; Trawlers must report to Conakry port once/year	0.15	0.2		0.15	0.2 inc. international organisations	0.26	0.4	+ 0.37 to reduce fishing effort
	2004-2008		Shrimps: 40mm; Cephalopods & finfish: 70mm; Live bait: 16mm.	All vessels >10nm; Rep. of Guinea will reserve 12nm for artisanal fleet.	Yes, on trawlers and when indicated on tuna seiners and LLs.	Send catch declaration; Onboard inspections; Communicate entrance/ exit		Limits established for finfish, shrimp and cephalopod vessels (betw 9%-35%)	JC	Trawlers must land 200kg/GRT/yr free. Excess bycatch may be collected by Ministry	Yes,Trawlers <200GRT: 2; 200-350GRT: 3; >350GRT: 4; Seiner fleet:6; P&L fleet: 4; LL: 2/vessel. ILO principles	Must have local agent; Trawlers must report to Conakry port once/year.	0.37 (all figures average over 5 years)	0.25		0.16	0.23 (international organisations)	0.27	0.5 (+0.8 for 2 surveillance vessels)	
Guinea Bissau	2001-2006 +	No	Yes for finfish;	>12nm	Yes Trawler: 1	Annual (before		Specified for Fin-fish;	JC (annual),	Yes (or financial	Yes Trawlers: 3-	Not mentioned	0.25	0.20	0.04	0.15		0.06	0.30	

Country	Date	Technical measures								Support to Local Economy			Detailed budget for Targeted Actions(€ million/year)							
		Biological recovery Period	Gear specification	Fishing zone	Scientific observers	Inspections & monitoring	Transhipment	By-catch limits	Joint Scientific Comm	Local landings	Local crew	Use of local services	Small-scale/local fisheries	Scientific support	Studies & TA	Training	Part. in int. meetings	Institutional support	MCS	Conservation
	2007 extn		cephalopod; shrimp vessels & live bait		observer Tuna vessels: on request	licence allocated)		cephalopod & shrimp trawlers	& scientific meeting (annual)	contribution)	6 dep. on size. Seiner fleet:7. P&L fleet:17									
	2007-2011	Not specified but provided for	ICCAT specifications	>12nm	Tuna – no ⁶¹ . Trawlers – yes, designated by Guinea-Bissau	Entry & exit notices, VMS to be defined by JC	Only in ports	Yes, according to Guinea-Bissau legislation	JC (annual), & scientific meeting (annual)	--	Yes. 3-6 Guinea-Bissau crew per vessel. ILO principles	--						0.5 (SPS & MCS)		
Kiribati	2003-2006			>12nm; >3nm from FADs; Closed areas; Seiners >60nm from main islands	Yes, on at least 20% of fishing trips. Vessels pay €400 on registration	VMS, report catches, communicate position and catches weekly; no transhipment at sea	Fleet must tranship at least 3 times/year in Kiribati ports		JC meets on request		At least 2 Kiribati nationals per vessel	Local agent			0.015 (reg & int fishery orgs)		0.05	0.035		
	2006-2012	No	WCPFC measures	>12nm, >3nm from anchored FADs, >60nm from main islands	Yes. Regional observers on request of WCPFC	Entry/exit notices, catch declarations, VMS Protocol	Only in ports	Not mentioned	JC (annual) & joint scientific meeting when necessary	--	6 ACP on PS fleet, 4 on LL fleet. ILO Principles	Not mentioned								
Madagascar	1998-2001	No	No	Beyond 10nm	Yes May be requested	Not mentioned		Not mentioned	JC	Not mentioned	6 seamen employed by seiners & LLs during season.	Encouraged	0.042	0.056	0.1			0.058	0.2	
	2004-2006	No	No	Beyond 12nm	Yes On request of authorities	Yes		Not mentioned	JC (meets on request)	Not mentioned	Yes Seiner and LL fleet: 40	Encouraged	0.023	0.03	0.02			No	0.09	
	2007-2012	--	IOTC measures	>12nm, >3nm from non-EU FADs	Yes, regional observers on request of Malagasy	Catch declarations, entry/exit notices, VMS Protocol	Only in ports	--	JC (annual) & scientific meeting when necessary	Incentives - Licence fee reductions of €5/t if landed, + €5/t if sold to	20% ACP (of crew signed on during season). ILO principles	--								

⁶¹ Parties will consult to define a regional observer system and choose a competent regional authority

Country	Date	Technical measures								Support to Local Economy			Detailed budget for Targeted Actions(€ million/year)								
		Biological recovery Period	Gear specification	Fishing zone	Scientific observers	Inspections & monitoring	Transhipment	By-catch limits	Joint Scientific Comm	Local landings	Local crew	Use of local services	Small-scale/local fisheries	Scientific support	Studies & TA	Training	Part. in int. meetings	Institutional support	MCS	Conservation	
					authorities					processing factory											
Mauritania	2001-2006	Yes for 6 sp.	By species	By sp & vessel type	Yes except tuna boats	Yes	Only in ports. Freezer trawlers tranship at least 15 times	0-20% dep on species, sanctions apply	JC (meets on request)	Yes Binding for demersal trawlers	Yes <350GRT: 4-7 >350GRT: >7	No	0.8	0.8	0	0	0.4	0.5	1.5	-	
	2006-2008	Yes for 5 sp (tbc for 1 sp)	By species	By sp & vessel type	Yes (can be requested for tuna boats)	Yes. VMS arrangements, but some problems with system		As per Mauritanian law	JC (annual) & Independent JSC (annual)	Voluntary with financial incentives	Yes Minimum numbers specified dep. on vessel GT	No	✓	✓		✓		✓	✓	✓ €1m Banc d'Arguin National Park	
Mauritius	1999-2002 Extens. 2002-2004	No	No	Beyond 12nm; Liners authorised to fish in traditional grounds only	May be requested for vessels >50 GRT	Not mentioned	Not mentioned	Not mentioned	No	Encouraged	Not mentioned	No		0.544	0.025						
	2003-2007	No	No	>15nm. >3nm from FADs. LL in traditional grounds only.	May be requested for vessels >50 GRT	Yes	May tranship	Not mentioned	No	Encouraged	10 seamen	No		0.15	0.03				0.015		
Micronesia (Fed. States of)	2006-2009		Comply with Palau Arrangement	EEZ >12nm & banks. >2nm fr anchored FADs, >1nm fr reefs	Yes Determined by FSM authorities. Vessels pay €500 with licence fee.	VMS, in accordance with FFA. Declare catches. Allow inspections.	Only in designated ports.		JC (annual) & Joint Scientific Meeting when necessary	None	Yes At least 1 FSM crewmember per vessel	Vessels must have local agent.	Objectives for introducing responsible fishing and sustainable fisheries to be defined, taking into account priorities in the national fisheries policy of FSM.								
Morocco	1995-1999	Yes – specific for fishing category	Yes – specified by fishing categories	Yes – specified by fishing categories	At the request of authorities	Yes		Looking into problem of discards	JC (annual), scientific cooperation	Yes Financial incentives. Compusory for cephalopod vessels	Yes 1-6 seamen dep. on vessel size	Encouraged – give detail of port facilities	-	4	-	20	-	30.25	-	-	

Country	Date	Technical measures								Support to Local Economy			Detailed budget for Targeted Actions(€ million/year)							
		Biological recovery Period	Gear specification	Fishing zone	Scientific observers	Inspections & monitoring	Transhipment	By-catch limits	Joint Scientific Comm	Local landings	Local crew	Use of local services	Small-scale/local fisheries	Scientific support	Studies & TA	Training	Part. in int. meetings	Institutional support	MCS	Conservation
	2006-2010	Yes Specific for fishing category	Yes Specified by fishing category	Yes Excluded Mediterranean zone & specific zones by fishing category	Yes (allocated by authorities)	Yes	Only in designated areas, with observer	Specified for some fishing categories	Joint annual scientific meeting	Yes Specified for different categories	Yes Up to 8 seamen depending on fishing category	Encouraged (incentives and requirements for landings)	4.75 for coastal fleet, support professional orgs	✓	Upgrade market channels	Methods of landing & handling fish	-	✓	-	1.25 abolish drift nets
Mozambique	2004-2007	--	None specified (but Mozambique legislation applies)	>12nm, between 10°30'S & 26°30'S.	Scientific staff may collect data. 'Fisheries inspectors' may inspect vessels, logbooks.	VMS to be agreed separately. Report catches. Communicate entrance/exit	Normally within Mozambican ports	Up to 535t comprising prawns, cephalopods fish, crawfish and crab	JC (annual)	No	Yes Half the crew	Have local agent. Give preference to Mozambican services		1.0	0.1 (QC)	0.43	0.06	1.0	1.5	
	2007-2011	--	None (only of a regional organisation that both parties are members of) ⁶²	>12nm	Yes, designated by IOTC	Entry/exit notices, report catches. VMS Protocol (not yet in force)	Only in ports	--	JC (annual) & joint scientific working group	No. Parties shall cooperate to improve landing and transhipment possibilities	20% ACP nationals, of which 40% to be Mozambican where possible	Vessels may use a local agent								
São Tomé & Príncipe	1984 (original agreement)				Yes, on request of authorities	Communicate catches when enter or leave			JC meets on request		No	No								
	2002-2005 +2006 extn		Tuna: ICCAT standards	>12nm. Crab vessels > 650m isobath. Not in Joint Development Zone	Yes Tuna: on request; deepwater crab: all vessels. Shipowners pay €10/day	Send catch records; Communicate entering & leaving & catches taken		Seiners to make bycatch available to Dept Fisheries	JC (meets on request); evaluate crab resource	No	Yes Tuna seiner fleet: 6	Procure supplies and services locally where possible	Yr1: 0.145 Yrs2&3: 0.07	Yr1:0.05 Yrs2&3: 0.04		Yr1: 0.04 Yrs2&3: 0.03	0.035 (reg & int orgs)	Yr1: 0.05 Yrs2&3: 0.04	Yr1: 0.05 Yrs2&3: 0.04	Yr1: 0.05 Yrs2&3: 0.04
	2006-2010	--	Tuna: ICCAT standards	>12nm. Not in Joint Development Zone	Yes, regional observers on request of STP	Send catch records, communicate entry & exit. VMS Protocol but not	Only within ports	No. Must be made available to authorities	JC (annual) & scientific meeting when necessary	No but licence fee reduction for transhipment in port	20% crew ACP + 'additional' Sao Tome crew	Encouraged. €5/tonne reduction in licence fee for transhipment								

⁶² Mozambique is not a member of IOTC, therefore IOTC gear specifications do not appear in the agreement.

Country	Date	Technical measures								Support to Local Economy			Detailed budget for Targeted Actions(€ million/year)							
		Biological recovery Period	Gear specification	Fishing zone	Scientific observers	Inspections & monitoring	Transhipment	By-catch limits	Joint Scientific Comm	Local landings	Local crew	Use of local services	Small-scale/local fisheries	Scientific support	Studies & TA	Training	Part. in int. meetings	Institutional support	MCS	Conservation
Senegal	1997-2001	Possible for 2-months for ocean going trawlers	Specified for trawlers & purse seine with live bait	Specified for trawlers (no zone for tuna vessels)	Yes	Yes		2-10% dependent on species	JC	Yes (specified)	Trawlers: 33% Deep-water trawlers: 4-5 Tuna: global req	Encouraged use of supplies & services	✓	✓		✓		✓	✓	
	2001-2006	Specified for demersal trawlers	Specified for trawlers & purse seine with live bait	Specified for trawlers & surface LL	Yes	Yes	In Senegalese ports	2-10% dependent on species	JC	Yes (specified)	Trawlers 50% Deep-water trawlers: 4-5 Tuna: global req	Encourage use of supplies & services Must have local agent	0.5	0.5	0.1	0.7	No	0.5	0.7	No
Seychelles	2002-2005	No	No	Excluded zones given	Can be requested by Seychelles authority	Yes (long-liners in port)	Not mentioned	Not mentioned	JC (meets on request)	Encouraged	Yes 2 seaman on seiners	Encourage use of supplies & services	0.41	0.316	0.1				0.333	
	2006-2012	No	IOTC gear measures	Excluded zones given	Seychelles observers, on request of Seychelles authority	Yes. VMS Protocol	In Seychelles ports	Not mentioned	JC (annual) & scientific meeting (annual)	Encouraged	Yes 2 seaman on seiners	Encourage use of supplies & services; Must have local agent						✓		
Solomon Islands	2006-2009	No	Comply with SPC and Palau Arrangement	For all vessels	Yes, determined by Permanent Secretary	Yes. No VMS Requirement	Only in designated ports	Not mentioned	JC (annual) & scientific meeting when necessary	Allowed but no obligation	Yes, 1 crew member from Solomon Islands	Local agent						✓		

Annex 3: Non-EU fishing agreements – Summary table

Table 1 of 2 – more recent agreements (1993 – 2007)

Agreement	Mauritania – Russia	Mauritania – Russia	Mauritania – Ukraine	Mauritius-Japan	China – Papua New Guinea
Date	1993	2003	2003	2000-2006 (updated in 2003)	2002-2007
Period/ validity	3 years, extendable by further 3 year periods	3 years, automatically renewed for another 3 years	3 years, automatically renewed for 3 years	1 year – the agreements was extended in 2005 for a further 12 months	5 years
Fishery				Tuna and associated species	
Type of vessels				Longliners	Not specified
No vessels	Specified under separate agreements (not available)	Specified under separate agreements (not available)	Specified under separate agreements (not available)	20 (In 2005, 16 were issued)	Specified under separate agreements (not available)
Access fee/ Compensation	Compensation detailed under separate agreements (not available). Cooperation for fisheries development, training & research	Compensation detailed under separate agreements (not available).	Compensation detailed under separate agreements (not available).	No details given	No details given
Licence fees				\$6,000 for a 90 day period & \$2,000 for additional 30 day period	Specified under separate agreements (not available)
Catch limits (fishing possibilities)				No limits (but limits on gear – see below)	Not specified
Av. fee per tonne tuna or per licence					
Technical Measures					
Fishing zones				Outside 50nm of baseline of Mauritius and Rodrigues, outside 15nm of another other island; outside 3nm of FADS	
Gears / vessels				Each vessel can use a long line 500 baskets; one basket contains 350m long line and six 20-30 branch lines, six hooks on 25m float line, and one buoy	
Reporting of movements				Required to notify data and time of entry or exit from Mauritius waters as well as points of entry or exit and the volume of catches. They must communicate their position every three days within in Mauritius EEZ.	

Agreement	Mauritania – Russia	Mauritania – Russia	Mauritania – Ukraine	Mauritius-Japan	China – Papua New Guinea
Reporting of catches		Logbook to be completed and sent to Mauritanian authorities at the end of each fishing trip	Logbook to be completed and sent to Mauritanian authorities at the end of each fishing trip		
Observers					
Inspections and monitoring		Control and monitoring needed, provisions to be discussed			Vessels shall allow boarding by authorised officials from PNG Government (but inspections must not affect normal fishing operations)
Other	Cooperate in scientific research	Support research to evaluate state of stocks, run, jointly with Mauritania, a Russian research vessel	Support research to on the ecosystems as a whole, reducing anthropogenic impact. Development of fishing gear, processing techniques and value added.		
Support to local economy					
Local landings				All fish may be landed or transhipped at Port Louis	
Use of local crew		No, but actions foreseen in developing infrastructure are to employ local workforce			
Use of local services	Mauritania to provide for needs of Russian vessels wrt mooring, supplies, services, crew replacement etc.	Mauritania to provide for needs of Russian vessels wrt mooring, supplies, services, crew replacement etc.		Vessels may procure supplies and services at Port Louis	Vessels may enter ports for supplies and services, storing or transshipping catches. China will set up a fisheries office in PNG for communication and other matters relevant to the agreement. Encourage technical and economic cooperation, promote joint ventures
Review of agreement					
	Joint Commission to supervise	Joint Commission to supervise	Changes must be agreed by both parties		Both governments and the relevant authorities shall seek to hold consultations re. the implementation of the agreement

Table 2 of 2 – older agreements (1978-1992)

Agreement	Gambia – Japan	Cook Islands – China (Taiwan)	Tuvalu – Korea	Palau – Japan	New Zealand – Korea	Senegal – Spain (pre-EU accession)	Angola – Spain
Date	1992	1984	1982-1983 ("licencing agreement", referring to the Fisheries Agreement of 1980)	1987 – 1988	1978 – 1982	1985 – 1987	1984
Period/validity	1 year, automatically renewed unless terminated	1 year	1 year, 2 months	1 year. Provision of goods and services for the fisheries development programmes of Palau to the value of ¥10m (US\$ 67,000), on condition that the agreement concerning access of Japanese vessels to Palau is approved.	4 years	2 years, automatically renewable for 1 year periods unless terminated	1 year, automatically renewable for 6-month periods until terminated
Fishery	Tuna	Tuna	Tuna		Not specified	Mixed. Tuna, hake, deep water shrimp	Tuna and Crustaceans
Type of vessels	Longliners and purse seiners.	Longliners	Longliners		Not specified	Purse seiners, trawlers, longliners	Shrimp trawlers and tuna purse seiners.
No vessels	No limit on number of vessels specified.	50	Max. 60		Not specified	15 shrimp freezer trawlers (marisqueros congeladores), max. 4500 GRT; and a further 15 shrimp trawlers, max. 4500 GRT; 35 longliners (atuneros), max. 34,900 GRT; plus further 7, with max. 7,000 GRT; 19 fish trawlers (arrastreros de pesca fresca), max. 6,100 GRT; 15 purse seiners (palangreros), max. 2,000 GRT.	45 shrimp/crab vessels; 10 tuna purse seiners.
Access fee/ Compensation	None	US \$ 57,500 (1year)	US \$ 70,000 (for 14 months)		Not specified	Minimum: 15 shrimp trawlers: 446,538,480 CFA/yr 19 fish trawlers: 50,423,036 CFA/yr	For shrimp: US\$ 300,000 plus 2.1 tonnes of fish for every tonne of shrimp caught.

Agreement	Gambia – Japan	Cook Islands – China (Taiwan)	Tuvalu – Korea	Palau – Japan	New Zealand – Korea	Senegal – Spain (pre-EU accession)	Angola – Spain
						35 tuna freezer boats: CFA 157,500,000 /yr CFA 15 Longliners: 112,500,00 /yr Total: 766,961,516 CFA/yr (~ US\$1.98m) Additional boats, up to CFA 145,168,275 (~US\$ 374,500) 75% of payment to Treasury 25% of payment to Fisheries Secretariat Plus: CFA 300,000 million for cold equipment CFA 97,020,000 for observers plus CFA 5,000 /day for observers on additional boats Research boat Spanish technical officer in CRODT.	
Licence fees	LL: US\$ 1,000 per vessel for 3 months; PS: US\$ 5,000 per vessel for 5 months	None. Access fee covers payment for 50 licences.	None. Access fee covers payment for 60 licences.		Not specified (vessels 'shall obtain licences in accordance with New Zealand law')	shrimp freezer trawlers: CFA 25,500 fish trawlers: CFA 11,250 purse seiners: CFA 16,500 LL: CFA 6 per kg tuna caught, if landed in Senegal; otherwise CFA 7.50 per kg tuna caught	For tuna: US\$ 40,000 (paid by shipowners)
Catch limits (fishing possibilities)	No limit on catches specified	No limit on catches specified	No limit on catches specified		NZ determines TACs, NZ harvesting capacity and allocation for Korean vessels of surpluses		For tuna: 100% of Angola's quota under ICSEAF For crustaceans: 700 tonnes, then pay \$550 per tonne on 10% of excess caught.
Av. fee per tonne tuna or per licence	\$1000 / LL licence \$5000 / PS licence	\$1150 / LL licence	\$1167 / LL licence			CFA 6,750	

Agreement	Gambia – Japan	Cook Islands – China (Taiwan)	Tuvalu – Korea	Palau – Japan	New Zealand – Korea	Senegal – Spain (pre-EU accession)	Angola – Spain
Technical Measures							
Fishing zones	Outside 12 nm	Outside 12 nm	Outside 12 nm		Not specified	Outside 12 nm; Longliners: from 25 miles S of Dakar; (deep LL): from 12 miles N of Dakar, (surface LL): from 15 miles N of Dakar; Tuna freezers: in Senegal EEZ;	Crustaceans: outside 12 nm, North of 12°20'S. Tuna: outside 9nm.
Gears / vessels		Purse seine fishing prohibited	Longline vessels only		Not specified	Nets: fish trawlers: 60mm mesh size; shrimp freezer trawlers: 40 mm mesh size.	
Reporting of movements	Notify of entry/exit within 24 hours before	Notify entry/exit within 24 hours before, notify amount of fish onboard. Notify position every 7 days within EEZ	Not specified		Not specified	Not specified	Tuna: communicate amount of tuna onboard on entry; exit to be controlled by Angolans.
Reporting of catches	Maintain daily catch record, report catches within 30 days of 1 st port call after fishing in Gambia waters	Maintain a log book, send a copy within 2 months of completion of voyage	Maintain log book, send copy within 45 days of completion of voyage.		Shall make available statistical and biological information as may be required.	Send quarterly catch declarations	Logbooks to be completed and sent monthly. Crustacean boats submit up to 10 days after transshipping. Quarterly catch reports to be submitted.
Observers	Not mentioned	Not mentioned	Not mentioned		Not mentioned	For trawlers and longliners less than 500 GRT, one crew member shall be designated as observer; For vessels over 500 GRT, an observer shall be taken on board.	Up to 2 Angolans may be put on board for inspection and control and scientific and technical studies
Inspections and monitoring	Not mentioned	Not mentioned	Not mentioned		Vessels shall allow and assist boarding by officials for inspection or enforcement	Not specified	Up to 2 Angolans may be put on board for inspection and control. Catches of crustaceans to be controlled by Angolans in Luanda or Lobito ports.

Agreement	Gambia – Japan	Cook Islands – China (Taiwan)	Tuvalu – Korea	Palau – Japan	New Zealand – Korea	Senegal – Spain (pre-EU accession)	Angola – Spain
Other					Shall refrain from harassing, hunting marine mammals; Cooperate in the conservation of shared stocks; Cooperate in scientific research	Scientific and technical cooperation – one trawl survey per year for shrimp and hake; annual technical meeting to analyse the data	Must inform of intention to tranship, must take place in Angolan bays; 40 studentships to study in Spain; Technical support for processing Jurel; Fish population specialist provided for 6 months
Support to local economy							
Local landings	No	No	No			140 tonnes of tuna per vessel per year should be landed. Tuna longliners pay a reduced licence fee if they land at least 140 tonnes in Senegal (6 CFA/kg c.f. 7.50 CFA/kg)	All bycatch from shrimp fishing is Angolan property; Catches of sardines, sardinella, 'boqueron' and 'dentino' are Angolan property.
Use of local crew	No	No	No			33% of crew to be Senegalese, on shrimp trawlers, fish trawlers and purse seiners; Not required on tuna freezer boats (atuneros congeladores).	
Use of local services	No	No	No			Not specified	Use of port services will be made available where possible
Review of agreement							
	Terms and conditions reviewed each year	Not specified	Not specified			Commission to monitor the agreement will meet annually. Fishing opportunities may be adjusted if stocks show important changes	Commission to monitor agreement and state of stocks, meets annually

Annex 4: Support to fisheries under EU National Indicative Programmes

Country	Mentioned Y/N		Total Budget (€million)	Budget allocation: Fisheries (€ million)	Type of Fisheries Projects / Objectives	Comments
	Back-ground ?	Included as a priority Sector?				
Angola	Yes	Yes	A: € 117 B: € 29	Under €18 Food Security and Good Governance	Food Security – a specified objective to reduce dependence on food aid in kind, and food insecurity. An emphasis on capacity building, training, technical assistance for legislation, support for the development of private services in agriculture, and agricultural pilot projects. However, no specific mention of funding for fisheries projects.	- Recognition of the need to manage Angola's marine fish resources and to improve the supply of fisheries products to the population
Cape Verde (2001-2007)	Yes	No	A: € 32 B: € 7.1	0	None	<p>States that the fisheries agreement contributes to:</p> <ul style="list-style-type: none"> - Food security (although earlier it describes how Cape Verde only produces 10-15% of food requirements) - Scientific research programmes - Study grants - Attending international conferences - Control of sanitary conditions & MCS - Landings by tuna fishing vessels <p>The fisheries sector has suffered from the closure of EU markets (in 2000) due to sanitary conditions. Exports went from 75% in 1993 to 16% represented by productive sector in 1999.</p> <p>Germany has previously provided support to the artisanal fisheries</p>
Comoros	Yes	No	A: € 20	0	None	- Fisheries mentioned in periphery support but no specific budget.

Country	Mentioned Y/N		Total Budget (€million)	Budget allocation: Fisheries (€ million)	Type of Fisheries Projects / Objectives	Comments
	Back-ground ?	Included as a priority Sector?				
			B: € 7.3			- Depending on circumstances, there is a possibility of reallocation of funds from other headings in the indicative programme to provide macroeconomic support.
Equatorial Guinea (2006-2007)	Yes	No	A: € 4.3 B: € 0.3	0	None	<ul style="list-style-type: none"> - A fisheries agreement was negotiated in 2001 (for four years) but the protocol was not signed. This would have included funding for increasing capacities, improving institutions, surveillance activities and promoting artisanal fisheries. - The FAO has previously supported artisanal fisheries in Equatorial Guinea - The NIP focuses entirely on improving governance of the country
Gabon (2001-2007)	Yes (briefly)	Yes Not priority but under objective to 'diversify'	A: € 34 B: € 45	0	€3.6 covers contribution to regional programmes such as the environment – this may include fisheries.	<ul style="list-style-type: none"> - The government itself has an objective to spend €12million on diversifying the economy and support agriculture, timber exports, tourism and fisheries. - The fisheries agreement is mentioned (one signed in 1998 and another in 2001) allowing exploitation for a return in compensation and targeted actions for the sustainable development of the sector.
Gambia	Yes	Yes Not a priority sector but included under other headings	A: € 37 B: € 14	Under €15m Rural Development	€ 15m set aside for rural development, including an initiative to develop producer organisations and inter-professional associations, that are economically active (including those of fisheries).	<ul style="list-style-type: none"> - The early years of EC cooperation with The Gambia were focused on Artisanal Fisheries
Guinea	Yes	No	A: € 158	See →	<ul style="list-style-type: none"> • Approximately €31.6 for rural development 	<ul style="list-style-type: none"> - Priorities are transport, rural development and

Country	Mentioned Y/N		Total Budget (€million)	Budget allocation: Fisheries (€ million)	Type of Fisheries Projects / Objectives	Comments
	Back-ground ?	Included as a priority Sector?				
(2002-2007)			B: € 63		which includes improved fisheries surveillance	<ul style="list-style-type: none"> - macro-economic support. - The last fisheries agreement adapted fishing possibilities to the real potential and included 370,000 for targeted actions
Guinea-Bissau (2001-2007)	Yes	No	A: €62 B: € 19	0	None	<ul style="list-style-type: none"> - Priorities of the NIP include infrastructure development, improved governance, and macro-economic support. - The government has proposed to improve the legal framework in the fisheries sector - EU has had agreements since 1980 – the 9th protocol runs for 5 years and is worth 51€million - €6.5million is targeted to support the fisheries sector - Other donors supporting the fisheries sector has included Spain (professional training) and the African development Bank (artisanal sector)
Ivory Coast (2004-2007)	No	No	A: € 182 B: € 82	0	None	<ul style="list-style-type: none"> - Rural development is selected as one of the priorities but this does not mention fisheries. Includes land security; transport; water; market chains - Priorities for - The other main objectives are good governance and macro-economic support. - The strategy mentions some of the non-committed resources (€30 million) will contribute to a better knowledge of the fishery resource; increased capacities; and support for a regional fisheries policy. However the amount allocated to fisheries is not quantified.
Kenya	Yes	Yes	A: € 170	Under € 50m	Promotion of fisheries private sector activities	-

Country	Mentioned Y/N		Total Budget (€million)	Budget allocation: Fisheries (€ million)	Type of Fisheries Projects / Objectives	Comments
	Back-ground ?	Included as a priority Sector?				
			B: € 55	Agriculture and Rural Development	through improved beach facilities, roads, water supply and electricity. Also, a strengthening of the Fish Inspectorate and Quality Control Service.	
Kiribati	Yes	No	A: € 8.8 B: € 2.2	0	No direct allocation to fisheries development, though funds may be made available to provide macroeconomic support. This would likely have implications for marine fisheries, which are of central importance to the economy.	- Recognition that there remains considerable untapped potential in the marine fisheries sector.
<i>Liberia</i>	<i>No country strategy or NIP</i>					-
Madagascar (2002-2007)	Yes	No	0	0	None	<ul style="list-style-type: none"> - Priorities are for transport, rural development, food security & macro-economic support. - Refers only to the Fisheries Agreement in place since 1986 (principally for Tuna) which provides support for surveillance, scientific research, training and support for the small-scale sector. - Previous targeted compensation set up a control and surveillance centre - German aid has provided support for the artisanal sector
Mauritania (2001-2007)	Yes	No	€191	0	Na	<ul style="list-style-type: none"> - Fisheries mentioned in periphery support but no specific budget - Receives support from other member states: Germany, Spain, France - Other donors also supporting fisheries sector: Japan, African Development Bank; OPEC
Mauritius	Yes	No	A: € 33	0	None	- The Environment is a focal sector, including "preservation of the natural resource base",

Country	Mentioned Y/N		Total Budget (€million)	Budget allocation: Fisheries (€ million)	Type of Fisheries Projects / Objectives	Comments
	Back-ground ?	Included as a priority Sector?				
			B: € 1.6			though not fisheries specifically.
Micronesia	Yes	No	A: € 4.8 B: € 1.4	0	No direct allocation to fisheries development, though funds may be made available to provide macroeconomic support. This would likely have implications for marine fisheries, which are of central importance to the economy.	- Fisheries discussed extensively in the background text though not included under any focal sector.
Mozambique	Yes	No	A: € 274 B: € 55	Under € 41m Food Security and Agriculture	Food security and agriculture a focal sector, though no specific mention of fisheries under these headings. However, € 2m allocated to fisheries in Annex 1: the projected timetable for financial support (no detail of specific projects/ objectives).	- Marine fisheries are generally overexploited and are declining in terms of export value. - Recognition that benefits of foreign exchange earnings from fisheries do not accrue directly to the population.
Namibia	Yes	No	A: € 48 B: € 43	0	None.	- Expansion of the fisheries sector increasing contribution to national GDP. This has largely been stimulated by EU private sector investment. - "Namibianisation" of the fishing sector since implementation of a new fisheries policy in 1991. - The fisheries sector is seen as an area in which the government is now successfully overseeing expansion that is equitable to the population.
Palau	Yes	No	A: 2.0 B: 0.6	0		- Fisheries will be dealt with through the RIP. - Mentions that the EU intends to establish bilateral fisheries agreements throughout the Pacific
Sao Tome & Principe	Yes	No	A: 9.4 B: 3.5	0	0	- Priority area is transport, - Spain, Portugal and France have provided support for artisanal fisheries - The EC has also co-financed an intervention by an NGO 2001-2004. Also the EIB has invested in

Country	Mentioned Y/N		Total Budget (€million)	Budget allocation: Fisheries (€ million)	Type of Fisheries Projects / Objectives	Comments
	Back-ground ?	Included as a priority Sector?				
						<ul style="list-style-type: none"> - private sector involvement in the fisheries sector - Fisheries agreement allows for targeted actions
Senegal (2002-2007)	Yes	Yes (see notes) Not a priority sector but included under other headings	€203	Under €35 Good Governance	<p>Economic governance: part of the Priority Area of Good Governance (€35 budget). One of the elements covers the creation of an enabling environment for private sector investment including increased technical and operational capacity in the fisheries sector. This includes more effective governance to ensure sustainable management – i.e. access rules, surveillance and research.</p> <p>Private sector interventions also include improving exportation of productive sectors; improving capacity for international negotiations; and integrating Senegal in the world economy. All these have relevance to the fisheries sector.</p>	<ul style="list-style-type: none"> - A €5million programme to support artisanal fisheries was included in the 8th EDF (ongoing). - The fisheries agreement (2002-6) is mentioned in light of 'new elements' to promote sustainable fishing and reinforce 'coherence' between development & fisheries policies. These factors include: annual scientific meeting; flexibility; biological rest-periods; 18% targeted to management; local employment; and local landings.
Seychelles	Yes	No	3.9	0	None	<ul style="list-style-type: none"> - Fisheries had been included in EDF 5 & 6, but not since. - The Fisheries sector and fisheries agreement are mentioned, but no budget is allocated in the NIP - Potential support for the fisheries sector could materialise through SME loans through support from the EIB to the Development Bank of Seychelles; ACP capacity building funds directed at phytosanitary conditions in fisheries; a request from the Seychelles government for additional resources to assist with developing and implementing a fisheries sector strategy; and

Country	Mentioned Y/N		Total Budget (€million)	Budget allocation: Fisheries (€ million)	Type of Fisheries Projects / Objectives	Comments
	Back-ground ?	Included as a priority Sector?				
						finally support to a coherent trade policy framework. There are also ACP free quota and duty trade benefits for importing into the EU.
<i>Sierra Leone</i>	Yes	No	A: € 178 B: € 76	Under € 5m Non-focal Sectors	Evaluation of the fisheries resources and, in particular, of the fishing possibilities which could be offered to the EC in the framework of a SL/EC Fisheries Agreement, and assistance to the negotiation of such an Agreement.	<ul style="list-style-type: none"> - Currently lacking a coherent national fisheries policy statement. - Developing a comprehensive policy framework, investment code and outline national fisheries plan is a short-term priority - Fisheries a focal area for support under the 7th EDF, though past projects have generally lacked sufficient recognisable impact.
Solomon Islands	Yes	No	A: € 6.7 B: € 7.8	0	None, but see comments.	<ul style="list-style-type: none"> - Support is focussed on 'sustainable rural development and community development' which may include coastal fishing as activities for promoting value added at village level, although this is not explicitly stated.
<i>Somalia</i>	Ys	No	€ 149m	Under € 31m Food Security and Rural Development	No mention of any specific fisheries projects or objectives.	<ul style="list-style-type: none"> - Absence of an all-encompassing national fisheries authority. - Fisheries a focal sector of EDF 1 & 2. - Somalia did not ratify the Lomé IV convention and so did not officially have access to EDF 7 & 8.
<i>South Africa</i>	Yes	No	€ 515	€ 1.2 Fisheries MCS	Funding allocated to develop fisheries surveillance.	<ul style="list-style-type: none"> - Discussions towards a fisheries agreement, currently suspended, may be resumed after the completion of the EU fishery policy reform.
Tanzania	Yes	No	A: € 290 B: € 65	0	No specific allocation for fisheries, though funding for improvements to transport infrastructure and macro support should have positive effects on the fisheries sector.	<ul style="list-style-type: none"> - € 2.2m allocated to fisheries MSC under EDF 8.

Annex 5: Support to fisheries under EU Regional Indicative Programmes

Country	Mentioned Yes/No		Total Budget (Million €)	Budget allocation : Fisheries (Million €)	Type of Fisheries Projects / Objectives	Comments
	Back-ground ?	Included as a priority Sector?				
Pacific Region	Yes	Yes	€ 29.0	€ 5.0 (17%)	<p>The conservation and optimum exploitation of fish stocks in the Western and Central Pacific by promoting regional cooperation and coordination of policies aimed at eradicating poverty and securing maximum benefits for the people of the Region.</p> <ul style="list-style-type: none"> - promotion of regional networks and actions - review of national fisheries policies especially in relation to shared resources - support for regional institutions for fisheries strategies that promote economic development, and to obtain accurate scientific data on coastal and oceanic marine resources 	-
West Africa (2001-2007)	Yes	<p>Yes (see notes)</p> <p>Not a priority sector but included under other headings</p>	€235	<p>€ 6 specifically for MCS</p> <p>Also fisheries part of €88 + €35 budgets</p>	<p>Monitoring Control & Surveillance: <i>6 Million Euros</i></p> <p>Regional statistics (including fisheries): <i>Part of support to integrating sectors into global/regional economy 88 Million Euros</i></p> <p>Definition of regional sectoral policies (particular attention to agriculture & fisheries and to food security): <i>Part of support to integrating sectors into global/regional economy €88 Million</i></p> <p>Support to food security: Possibility of a study to evaluate the development and coordination needs of fisheries policies & support measures: <i>Part of €35 Million Euros support to 'other programmes'</i></p>	<ul style="list-style-type: none"> - Fisheries mentioned as an important sector in the issue of food security – high percentage of fish as animal protein - Importance of reinforcing capacity of RFO: Sub-Regional Commission of Fisheries (Mauritania, Cap Verde, Senegal, Gambia, Guinea, Guinea Bissau) - Importance of maintaining coherence between FAs and country development as requested in Council Resolution of 8th Nov 2001 and with national fisheries strategies. This will require support on a better understanding of resource, reinforce capacities of formulating and monitoring the regional policy - Support the capacity of countries to take part in

						negotiations related to agriculture and fisheries
East Africa & Indian Ocean Region (2002-2007)	Yes	Yes (see notes)	€223	7-12% Directly targeted at Fisheries 15.6 to 26.8 15-25% targeted at management of natural resources.	One of the focal programmes is for Management of Natural Resources. This includes sub-components: Fisheries Resource Management and Monitoring: - MCS of Pelagic species: 6.7–11.15 € Million (3-5%) - Indian Ocean tuna tagging: 6.7–11.15 € Million (3-5%) - Coastal and regional fisheries: 2.2 to 4.5 € Million (1-2%) Environmental management: - Including marine environmental monitoring plan (AMESD): 15.6 to 22.3 € Million (7-10%) - Lake Victoria Basin management (covers environmental & fisheries issues) 2.2 to 4.5 € Million (1-2%) - Environmental education (covers wide area of environment) 2.2 to 4.5 € Million (1-2%) - Capacity building for implementing international conventions ((covers wide area of environment)	Fisheries issues - Management of Natural Resources is highlighted as a key policy agenda of the region. In particular the management of coastal, lake and marine resources is seen as vital for sustained development of the region. - The fisheries sector is also highlighted as providing important export earnings, as well as earnings from EU Fishing Agreements. It states that these will necessarily have to take sustainable resource management and development objectives of countries into account. - The Indian Ocean Commission is seen to provide benefits which has improved with EDF-funded technical support unit. Trade issues: - Support to economic integration and trade is another focal area of the RIP to provide support to trade negotiations. (45-55% of budget) - Although fisheries is not specifically mentioned it could be included.
Southern Africa Development Community (SADC)	Yes	No	€101	0 (All funding directed specifically at fisheries allocated from EDF 8 for MCS)	Monitoring Control & Surveillance: <i>13 Million Euros</i> - MCS problems addressed with a 7-year "SADC Regional Monitoring, Control and Surveillance of Fishing Activities Programme", which commenced in 2000 and is co-financed by the EDF 8 RIP and the NIPs of Angola, Mozambique, Namibia and Tanzania.	

Annex 6: Summary of Poverty Reduction Strategy Papers for Case Study Countries

Country	Date	Priorities	Fisheries included?	Details	Budget	Fishing Agreement	NIP	Comments on Coherence
Senegal	2002	<ol style="list-style-type: none"> 1) Wealth creation 2) Capacity-building & promotion of basic social services 3) Improving living conditions of vulnerable groups 	Yes	<p>Under priority for wealth creation, there is an objective to revive the fisheries sector and focus on:</p> <ol style="list-style-type: none"> i) Sustainable management and restoration of fishery resources ii) Meeting domestic demand iii) Added value of fisheries products iv) Qualification of sector professionals; v) Financial management 	<p>\$9million/year (approximately)</p> <p>[Budget focuses on fisheries equipment for national fleet and support of processing sector]</p> <p>A review in 2004 reported that \$1million had been mobilised for the fisheries sector (2% share of total resources)</p>	Fisheries Agreement until 2006	2002-2007 Fisheries not a priority area	<ul style="list-style-type: none"> - The local processing sector is a concern and the FA's have required specified local landings - Why does EU NIP not include support for fishery infrastructure/capacity of national fleet/institutional weaknesses (incl. sustainable financing) and other problems outlined in PRSP? - Look at conflicts – does the FA address this? - Are EU products over subsidised so that Senegalese products are not competitive on the international market?
Mauritania	2000	<p>Priority 2002-2004:</p> <ul style="list-style-type: none"> - Growth - Pro-poor growth - Education & Literacy - Health - Water - Institutional capacity 	Yes	<p>Within the overarching objective of accelerated growth fisheries is considered a priority. This includes developing the export sector through:</p> <ol style="list-style-type: none"> i) Rational fisheries management through increased surveillance ii) Strengthening sector's integration into the economy and improve resource rents; iii) Encourage local processing: provide training and infrastructure; iv) Increase artisanal fishing for job creation and food security 	\$600,000 in 2003 and \$2.8million in 2004.	Fisheries Partnership Agreement 2006-2008	2001-2007 Fisheries not a priority area	<ul style="list-style-type: none"> - One of the objectives of the PRSP is to improve the terms of the EU fisheries agreement to increase stability of exports and budgetary receipts; [Compensation does not increase between 2002 and 2007 – check earlier amounts - Despite focus on processing industry – local landings are still only voluntary although financial incentives exist.

Annex 7: Sustainability Impact Assessments

This section seeks to provide an overview of EU impact assessment (IA) procedures, including an analysis of how the European Commission (e.g. The Directorate Generals for Trade (DG Trade) and Development (DG Development) and Health and Consumer Protection (DG Sanco) conduct assessments of the effects of trade measures on sustainable development within developing countries. This includes indicators used, process mechanisms, consultation and feed-back procedures, and the extent to which the concerns of third countries are taken into account.

Following the publication of an occasional working paper in 2001⁶³ EU institutions have made substantial changes to the way in which IAs are carried out. This is partly related to the Lisbon objective of enhancing economic competitiveness. EU wide guidelines have been developed and within the European Commission (EC) the directorates have been developing guidelines that meet their own internal needs and objectives. The EC introduced a new IA system in 2003, which aimed to improve the quality of the EU's policies in terms of their efficiency, effectiveness and coherency. Likely positive and negative impacts are identified, with a particular focus on economic, environmental and social effects, as well as alternative policy options.⁶⁴

Within DG Trade, Sustainability Impact Assessments (SIA) are more established than in DG Development and DG Sanco. The EU launched the first SIA in 1999, in anticipation of the new WTO round of negotiations. With respect to trade negotiations, an SIA is undertaken before and during a trade negotiation and the aim is to integrate sustainability into trade policy by informing negotiators of the possible social, environmental and economic consequences of a trade agreement. Accompanying measures should be identified to maximise the positive impacts of the trade negotiations in question, and to reduce any negative impacts.

DG Sanco has issued internal guidelines for the preparation of Sanco Scoping Papers⁶⁵. A key innovation in the scoping guidelines for DG Sanco is the early use of IA and an encouragement to officials to undertake consultation at the beginning of the policy development process. All IA must now consider monitoring and evaluation ideas and, where appropriate, indicators. The new guidelines place greater emphasis on the need to understand and identify indirect and unintended impacts of legislation.

63 The European Policy Centre, "Regulatory Impact Analysis: Improving the Quality of EU Regulatory Activity" (2001).

64 General information on IA can be found on the Secretariat General's Impact Assessment website

http://ec.europa.eu/enterprise/regulation/better_regulation/impact_assessment/index.htm) and the EC's approach is described in its SIA handbook: Handbook for Trade Sustainability Impact Assessment (<http://ec.europa.eu/trade/issues/global/sia/studies.htm>).

65 European Commission Health & Consumer Protection Directorate-General "Guidelines for the Preparation of a DG Sanco Scoping Paper" (2005).

The FPAs must also be reviewed in the light of the WTO Doha Round trade negotiations. Some key trade measures which must be considered in relation to the fisheries sector include:

- Market access (i.e. tariff and non-tariff measures) as part of the negotiations on non-agricultural market access (NAMA);
- Subsidies to the fisheries sector in different forms, which are being discussed by the WTO Negotiating Group on Rules; and
- Other trade issues, e.g. eco-labelling and services incidental to the fishery sector.

Methodology for Sustainable Impact Assessments

DG Trade has been at the forefront of developing the SIA methodology and process. The methodology for analysing impacts of trade negotiations has been developed for the EU through inputs from Institute for Development Policy and Management (IDPM), Manchester University. Overall the methodology identifies the three key areas of impact – social, economic and environmental – each of which is allocated broadly similar importance. The key components of the SIA methodology are:

- Scenarios for negotiation outcomes – initially assessed by screening and scoping;
- Development and use of indicators of impact, especially second tier indicators, which in this instance would be specific to fisheries and FPA;
- Causal Chain Analysis (CCA) using pre and post (equilibrium) adjustment scenarios;
- Identification and implementation of case studies for countries representative of key groupings;
- Development and use of prevention, mitigating and enhancement measures (P, M and E) to interact with initial CCA outcomes.

The analysis invariably requires an initial screening process to identify areas where potential changes are occurring with respect to trade policy/FPA negotiations. In undertaking the screening process, various criteria can be used including:

- The likely scale of impact of the trade measure/FPA on particular production systems;
- The location of impact, especially with respect to developing countries and LDCs;
- The extent to which specific groups will be affected; this should include the artisanal fisheries sector, who are often amongst the poorest in the fishing communities;
- The environmental impact of changes especially with respect to more intensive systems, e.g. in terms of intensity of fishing effort;
- The availability of data and reliability of qualitative information.

Sustainability indicators and significance criteria

For marine resources the United Nations Conference on the Environment and Development (UNCED) has identified a number of key areas of concern and required action with regard to sustainability, namely:

- Integrated management and sustainable development of coastal areas, including exclusive economic zones;
- Marine environmental protection;
- Sustainable use and conservation of marine living resources of the high seas;

- Sustainable use and conservation of marine living resources under national jurisdiction;
- Addressing critical uncertainties for the management of the marine environment and climate change;
- Strengthening international, including regional, cooperation and coordination;
- Sustainable development of small islands.

The EU SIA studies use sustainability definitions and common methodology discussed in Kirkpatrick and Lee⁶⁶. This definition comprises three categories of core indicators covering the economic, social and environmental dimensions, plus a fourth category of process indicators which assist in analysis of sustainability and sustainable development issues. Each of these categories of impact can be assessed using the core indicators shown in Table 1. For each of the core indicators in turn there are more detailed second tier indicators which are more specific to fisheries, and which attempt to incorporate key aspects of the UNCED agenda. Table 1 includes draft second tier indicators and various criteria have been used in their selection. Thus, such second tier indicators need to cover each of the nine core and two process indicators; if possible, data should be available to measure each indicator and if quantitative data are not available, then it must be possible to provide some indication of the nature, significance and direction of the likely change. In addition, changes in indicators should be linked to changes in trade measures and should be chosen to illuminate specific fishery impacts that are of value to trade negotiators.

The second tier indicators provide the means for assessing the changes in core indicators that can arise from implementing FPA. This requires the development of assessments of the likelihood, scale and reversibility of impacts. Since data are unavailable with respect to country groups, case study countries are used to analyse the direction and scale of effects.

In the case of many outcomes there are preventative, mitigating and enhancement (P, M and E) measures that can be applied which will interact with the original outcome to produce a different final result. The aim is to use the indicators in order to assess impact, especially process indicators. Thus, the screening and scoping analysis, besides covering trade negotiation outcomes, can also provide initial assessment of the types of P, M and E measures that need to be considered. The types of factor that are of importance in screening and scoping for fisheries are briefly noted in Table 1.

P, M and E measures (also termed “flanking” measures) represent actions that can mitigate negative impacts or improve positive impacts of trade measures. They have assumed growing importance in SIAs as the methodology has been developed. There are three criteria for assessing the value of individual P, M and E measures:

- Impact on sustainable development (using primary and secondary indicators identified in Table 1);
- Cost effectiveness (i.e. size and distribution of costs);
- Feasibility (in terms of political, institutional and financial processes required).

⁶⁶ Kirkpatrick, C. and Lee, N. (2002) *Further development of the methodology for sustainability impact assessment proposed WTO negotiations: Final report to the European Commission*, IDPM, University of Manchester

Table 1: Sustainability indicators for SIA of FPAs

Sustainability dimension	Core indicators	Possible second tier indicators
Economic	Real income	Levels of production, trade, income levels of different stakeholder groups, expenditure, consumption - payment in kind*. Foreign exchange earnings; Govt. revenues (licence fees, taxes, etc); bunkering
	Employment	Levels of employment in fishing and post-harvest fisheries industries, semi-industrial and artisanal employment*;
	Fixed capital formation	Size and type of fleet, gear, landing and processing infrastructure; etc
Social	Poverty	Indebtedness*, food security, nutrition data, female headed households*, coastal livelihoods and development, coastal-urban migration;
	Health and education	Primary health care, primary education levels, especially in fishing communities;
	Equity	Income distribution, asset ownership* (boats and gear, processing); gender distribution – income and assets*
Environmental	Natural resource stocks	Change in marine and freshwater stocks, change in catch/composition (e.g. total allowable catch);
	Environmental quality	Changing marine and freshwater /aquaculture pollution; changes in eco-systems;
	Biodiversity	Change in endangered species, change in protected areas, change in deepwater fishery;
Process	Consistency	Domestic policies, EEZ monitoring, control over foreign fleets, international commitments – stock conservation, aquaculture policy;
	Institutional capacity	Impact on government managerial capacity and commitment; government use of revenues from FPA; monitoring, control and surveillance capacity.

* indicators where data are more likely to contain qualitative elements.

The “best” P, M and E measures can then be integrated with the initial assessment to produce modified scenarios, both in terms of individual P, M and E measures and for the package as a whole. The types of measure include:

- Trade related measures that can be directly built into agreements or developed in parallel, e.g. supporting developing country and LDC production and export diversification and regional trade agreements;
- Negotiation and clarification of the interaction of FPAs and other agreements e.g. the effects of environmental measures;

- Technical assistance to improve a county's capacity to participate in and benefit from rules based trading systems; e.g. as part of Economic Partnership Agreements (EPAs)
- Trade measures taken in the framework of International and Regional Fisheries Management and Conservation Arrangements;
- Full compliance with international commitments on fisheries – and integration of such commitments into fisheries agreements (i.e. on the protection of marine habitats in deep waters in the high seas);
- The development of measures at regional level to ensure the sustainable exploitation of stocks and mitigate impacts on other components of marine ecosystems (e.g. non-commercial species) and the role of Regional Fisheries Organisations in this respect.

Figure 1: Main Steps in Sustainability Impact Assessment (SIA) of Fisheries Partnership Agreements

